Young People's Panel Final report

December 2021

Wessex Water
YTL GROUP

your say your future
young people's panel

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Evidence streams

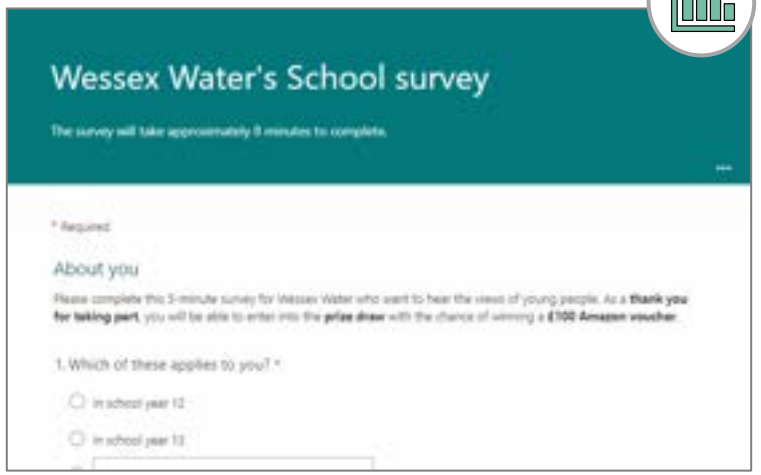
Young People's Panel at Wessex Water

Day 1 (22nd Sept 2021)

- 'Speed immersion' with Wessex Water experts & task
- Group discussion
- Task briefing

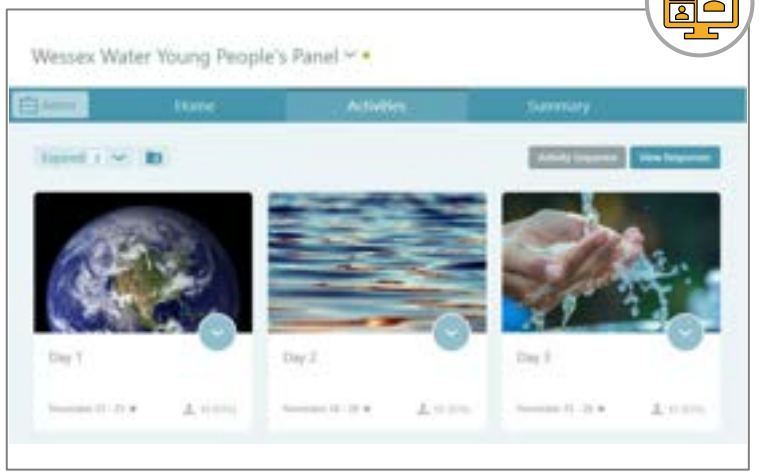
Day 2 (12th Nov 2021)

- Task presentations
- Group discussion
- Group activities:
  - Control room visit
  - Communications task



Schools survey

- Sent to the Head of the Sixth Form / school of students participating in the Young People's Panel
- A total of 326 students from years 12 & 13 took part
- Included questions about behaviours and attitudes towards:
  - Future plans / prospects
  - The environment
  - Wessex Water
- Fieldwork took place between 5th to 24th November 2021



Online community (3 days)

- 15 students from the panel took part in an online community over 3 days
- Students completed the activities and questions between 23-25 November 2021

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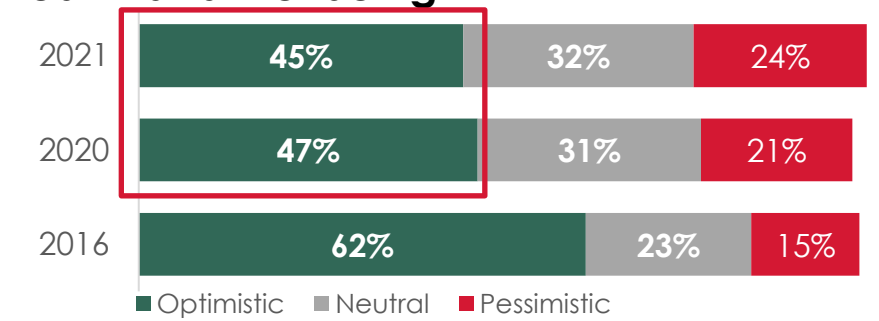
A snapshot of future customers' prevailing attitudes

Life during COVID has been difficult with increased concern about health & wellbeing persisting

COVID-19 over the previous 18 months

- Overall, sentiment towards COVID and 'lockdowns' is **negative**. People felt there had been a detrimental and lasting impact on their lives
- Most found the quality of teaching in online classes **poor** compared to in-person; there was evidence of different experiences between school types
- Students are open about the impact on their **mental health** – feeling anxious when meeting up with friends again afterwards.
- Very **few found this period a good opportunity** to "improve themselves" despite the additional free time they had

Health and wellbeing



"The quality of teaching went down and mental health has dipped from not interacting with friends."
Future customer

"Online it's hard to ask questions - it's hard to unmute yourself and ask a question, so we missed out on learning."
Future customer

How are you currently feeling about the following issues in relation to life after education? How are you currently feeling about the following issues in relation to you and your school life? Base: 2016 (578) / 2020 (555) / 2021 (326)

COVID is expected to have lasting impacts on mental health, even so there is optimism with some positive impacts too

Lasting impacts of COVID-19

- The biggest concern is about the impact COVID has had on people's **mental health**
- At school, **online seems to have become an acceptable** teaching channel, e.g. when teachers are ill or weather is bad
- Plus, there is **greater use of laptops** in school which isn't preferred by all
- In general, the general public seem to be **more appreciative and nicer** to each other
- There is a perception the **UK has caught up with other countries technologically**, as adoption of computers & tech was accelerated
- During lockdown, there were **reduced emissions**, it's hoped some reduction will be maintained
- Another perceived environmental benefit is the **reduced use of paper** with increased use of tech
- There are **benefits for family life**, parents continue to work from home, spend less time commuting and at home more

"It's also been difficult from a mental health perspective because we haven't met many people - it will have an effect for a whole generation."
Future customer

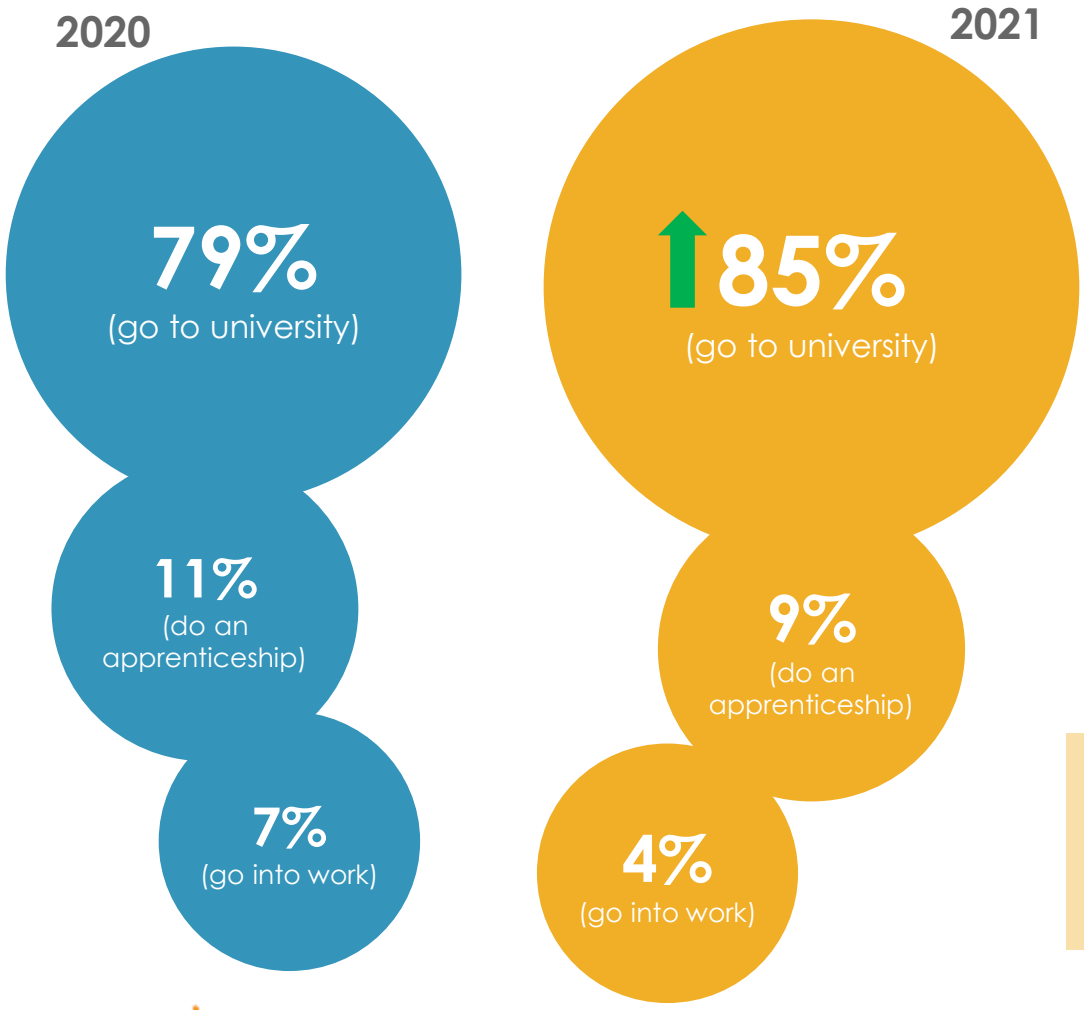
"It's hard getting back into a real person setting - you don't know who to sit next to... seeing friends again is nerve-wracking as haven't socialised in a long time."
Future customer

"The UK was lagging behind technologically and it's brought us up to speed with other countries."
Future customer

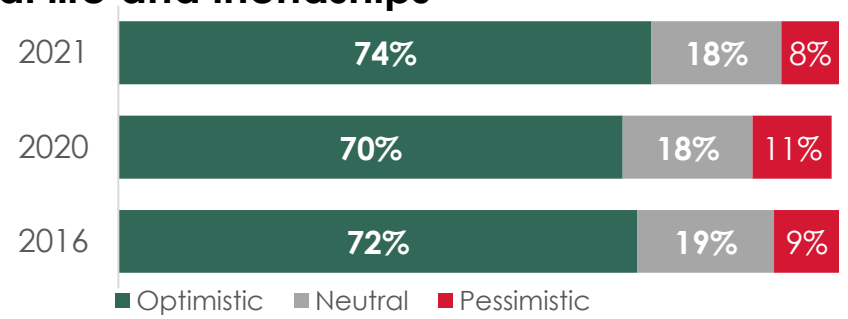
"If my dad couldn't work from home he'd have to commute two hours."
Future customer

More students this year expect to go to university but their focus on education and friends is unchanged

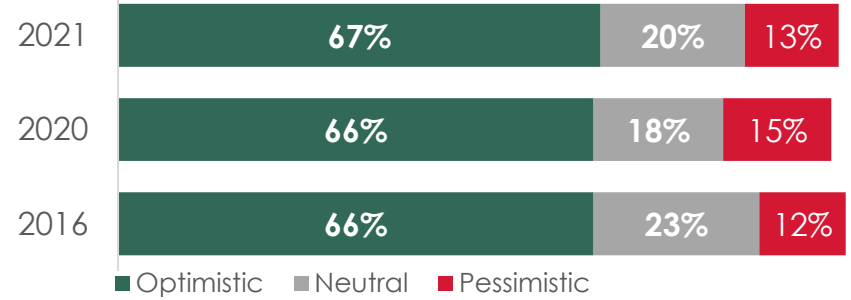
Future plans (after year 13 or a gap year)



Social life and friendships



Achieving educational goals



Are apprenticeships becoming less attractive, there seems to be a directional trend downwards (in 2019 13% expected to go onto one)

Is this trend evident in interest in the Wessex Water apprenticeship scheme?

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What are you most likely to do after year 13 or after a gap year? Base: 2020 (555) / 2021 (326) How are you currently feeling about the following issues in relation to life after education? How are you currently feeling about the following issues in relation to you and your school life? Base: 2016 (578) / 2020 (555) / 2021 (326)

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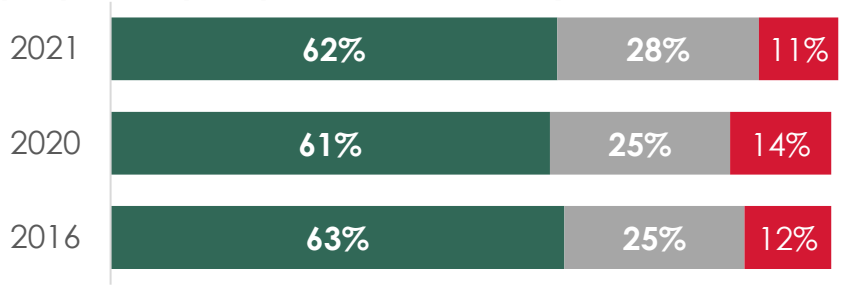
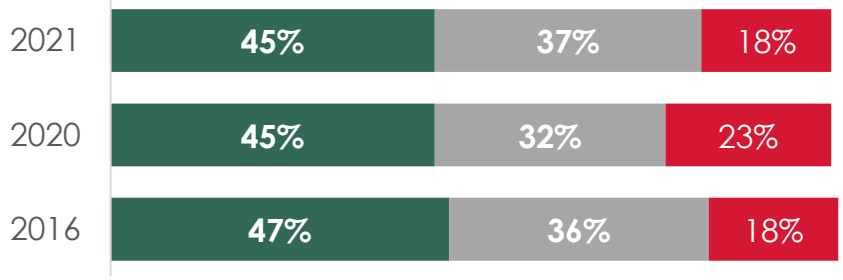
Are declines in optimism to accessing the housing ladder the tip of the iceberg to long-term attitudes to financial security…

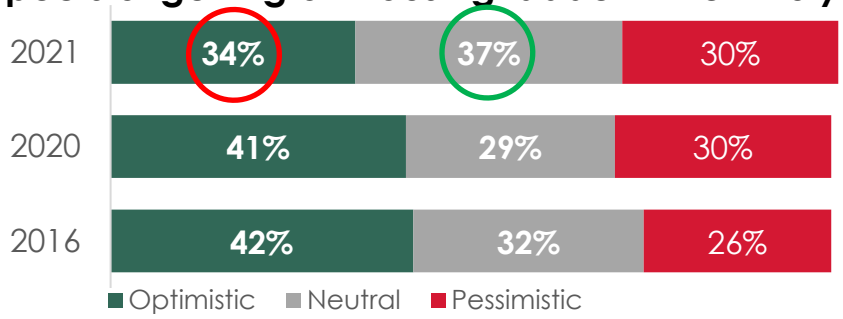
Employment prospects in next 10 years



Financial prospects in next 10 years



Prospects of getting on housing ladder in next 10 years



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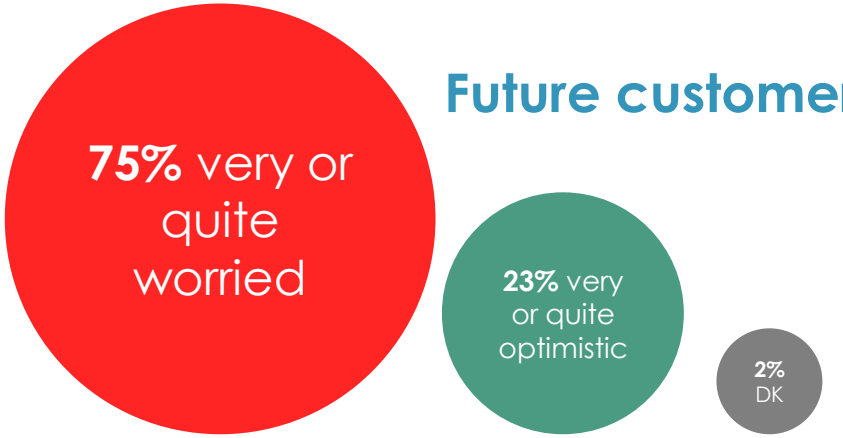
How are you currently feeling about the following issues in relation to life after education? How are you currently feeling about the following issues in relation to you and your school life?
Base excluding don't knows: 2016 (578) / 2020 (532) / 2021 (312)

Environmental attitudes

Overall concern about the environment appears greater for future customers

- Climate change weighs heavily on the minds of our future customers, with most worrying about it 'from time to time' and some worrying 'everyday'. [YPP Community Panel of 15 participants]
- Reflected again in the School Survey, three quarters say they are very or quite worried - a significantly higher proportion than we saw in our national survey with adults

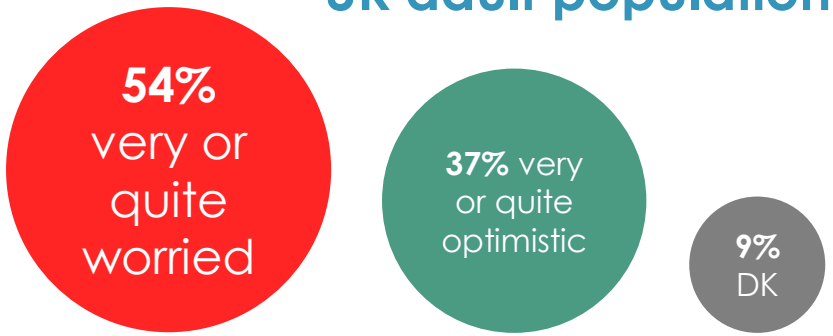
Future customers



Q: Considering how climate change might affect people in the UK, how do you feel about the future?
YPP School Survey 2021 (326)

Vs.

UK adult population



Q: Considering how climate change might affect people in the UK, how do you feel about the future?
Blue Marble Environmental Attitudes Survey 2021 (2,090)

Top of mind local environmental issues relate to what future customers have experienced

Spontaneous local environmental concerns

- **Flooding:** referencing the Somerset levels, dredging the Parrett, surface water flooding and drains overflowing
- **River pollution:** esp. noticeable during summer, several wild swimmers; Warleigh Weir in the news; agriculture run-off
- **Air quality:** Bath known to be particularly bad; discoloured stone; traffic related
- **Littering:** a general problem

"In the past few years the big climate effects we've had has been flooding, 2014 when river Parrett was dredged properly which caused massive flooding around where I live."
Future customer

"The new electric scooters have been found [in the river]… basically anything that can be picked up and stolen is chucked in it. It's the biggest thing you notice."
Future customer

"The loss of one species can have an impact on the whole ecosystem."
Future customer

"Extreme weather - affects everywhere, rural and urban areas, and has a direct impact on Wessex Water's pipes."
Future customer

Prompted local environmental concerns

Unanimous agreement of three most important issues selected as 'catalyst' factors that cause chain reactions.

- **CO2 emissions**
- **Loss of different species**
- **Extreme weather events**

Local droughts generally of lowest concern: most had never encountered droughts.

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While future customers are more worried about the environment than adults, their specific concerns follow similar patterns.

- Micro plastics and air pollution are the biggest concerns by some margin.
- Future customers are notably more concerned about biodiversity and less concerned about river pollution from sewage
- River pollution from sewage is a significant concern with over a quarter of future customers and over a third of adults putting it in their top 3 concerns

	Future customers	UK adult population
Micro plastics in the environment	61%	65%
Air pollution from household smoke and road vehicles	61%	56%
More frequent and severe flooding from rivers and the sea	36%	36%
Reduced biodiversity	36%	18%
The need for more trees to be planted	33%	34%
River pollution from sewage	28%	36%
More frequent and severe droughts	16%	14%
Erosion of soil and reduced soil fertility	15%	15%
River pollution from agriculture	13%	14%
Invasive species on land and water	3%	8%

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Below is a list of environmental issues affecting the UK, please pick the **top THREE most concerning to you** 2021 Base: (326)

Water UK Storm Overflows Evidence project 2021 Base: (2,096 UK adults)

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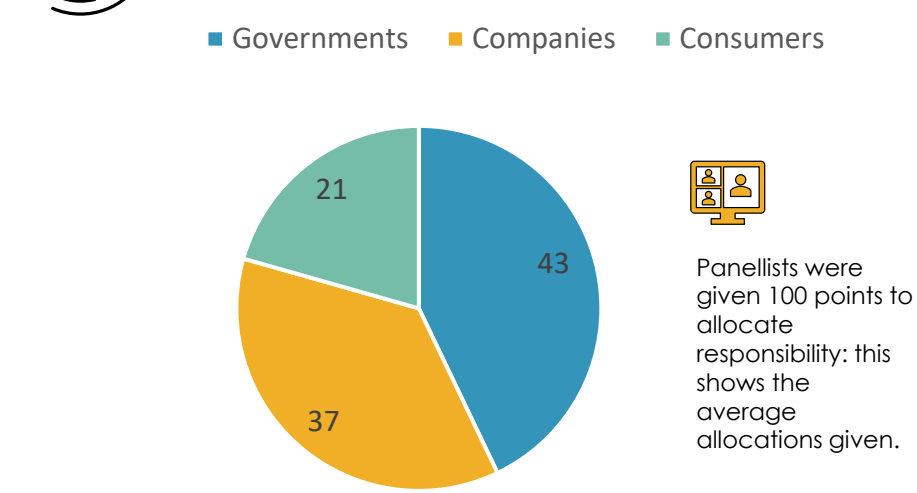
Future customers believe the government is primarily responsible for tackling climate change with companies a close second.

Future customers feel that responsibility falls on governments and companies, with consumers having the least responsibility.

- **Companies** engage in behaviours most detrimental to the climate and therefore shoulder more responsibility for addressing the problem.
  - However, respondents believed that companies will not make the changes necessary without being forced to by governments and laws.

- Ultimately, future customers believe **governments** are responsible for addressing this issue
  - They hold the legislative power to introduce regulations and laws that force companies to reduce their impact on the climate.

Who is responsible for addressing climate change?



Panellists were given 100 points to allocate responsibility: this shows the average allocations given.

Around half of our YPP panellists started to follow **COP26**, however initial interest subsided as the conference went on.

"Governments should properly regulate companies and end subsidies to harmful industries such as meat, fish, oil and coal, to reduce climate change: it is the world's companies that need to stop polluting."
Future customer

"Consumers, by definition, can only consume what is on the market and being offered by companies. If there are no effective combatants for climate change then consumers cannot help the situation."
Future customer

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Like UK adults, future customers are not completely accurate about the most impactful behaviours

As observed in previous research with the wider population, future customers are not always accurate about what actions have the most impact in **tackling climate change**

PERCEIVED MOST IMPACTFUL BEHAVIOUR CHANGE

1. Buying renewable energy
2. Not having a car/replacing it with an electric or hybrid
3. Recycling as much as possible

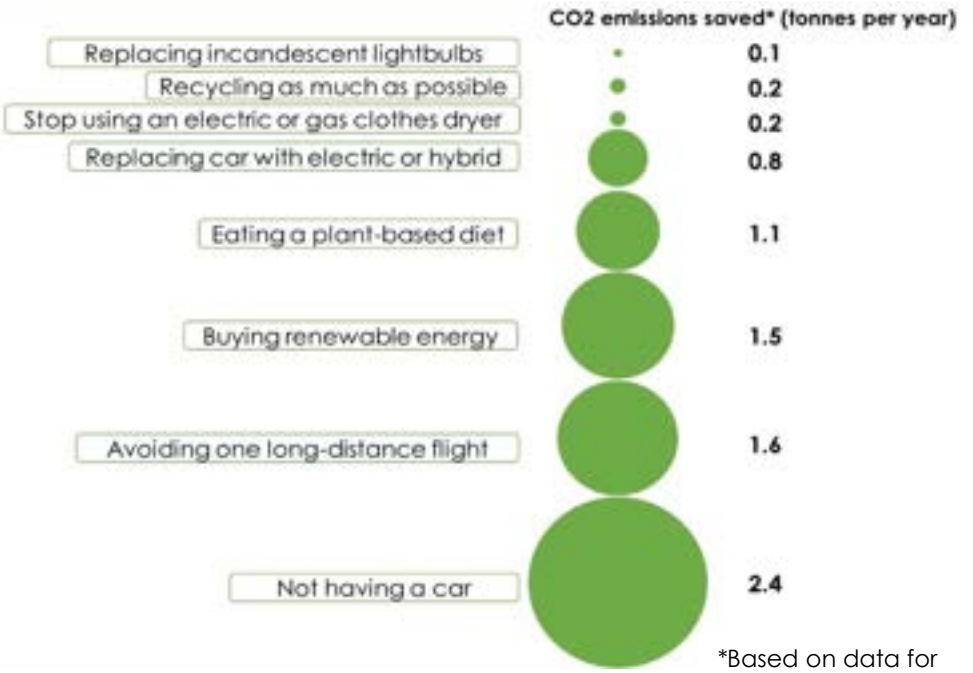
- Most of our future customers are **already** recycling as much as possible and replacing inefficient lightbulbs

Once shown the actual most impactful behaviours…

- Our future customers feel they are <u>most likely</u> to **avoid one long distance flight,** and try to **eat a plant based diet**

- They are reluctant **to stop using a car;** many explicitly mentioned the necessity of a car when living in rural areas.

ACTUAL MOST IMPACTFUL BEHAVIOUR CHANGE



*Based on data for developed countries

"For me, not having a car just because of where my family and I live, it's a small village and we rely on driving to get us to almost everywhere we go..."
Future customer

"For people like me and my family who live in rural areas, giving up a car is very hard as it is our only option of transportation."
Future customer

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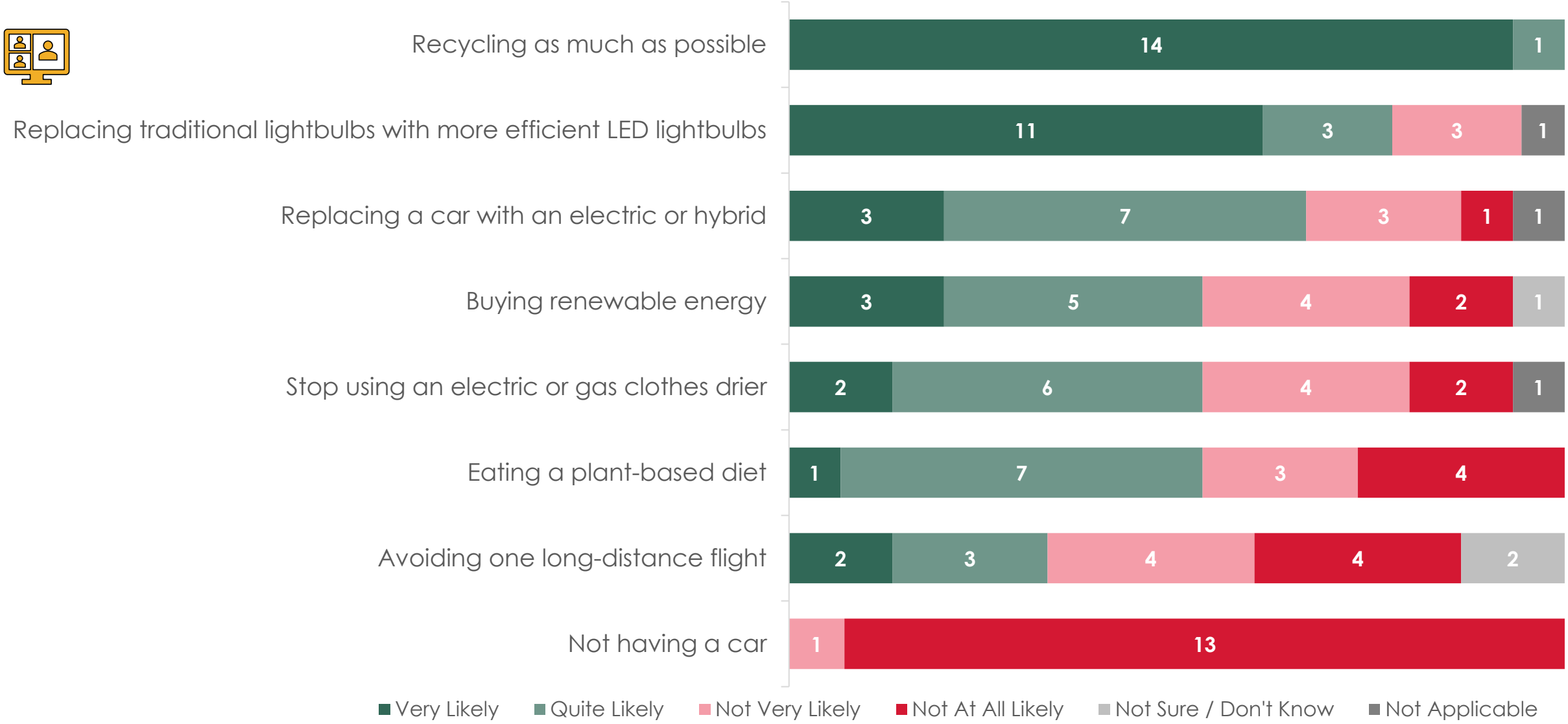
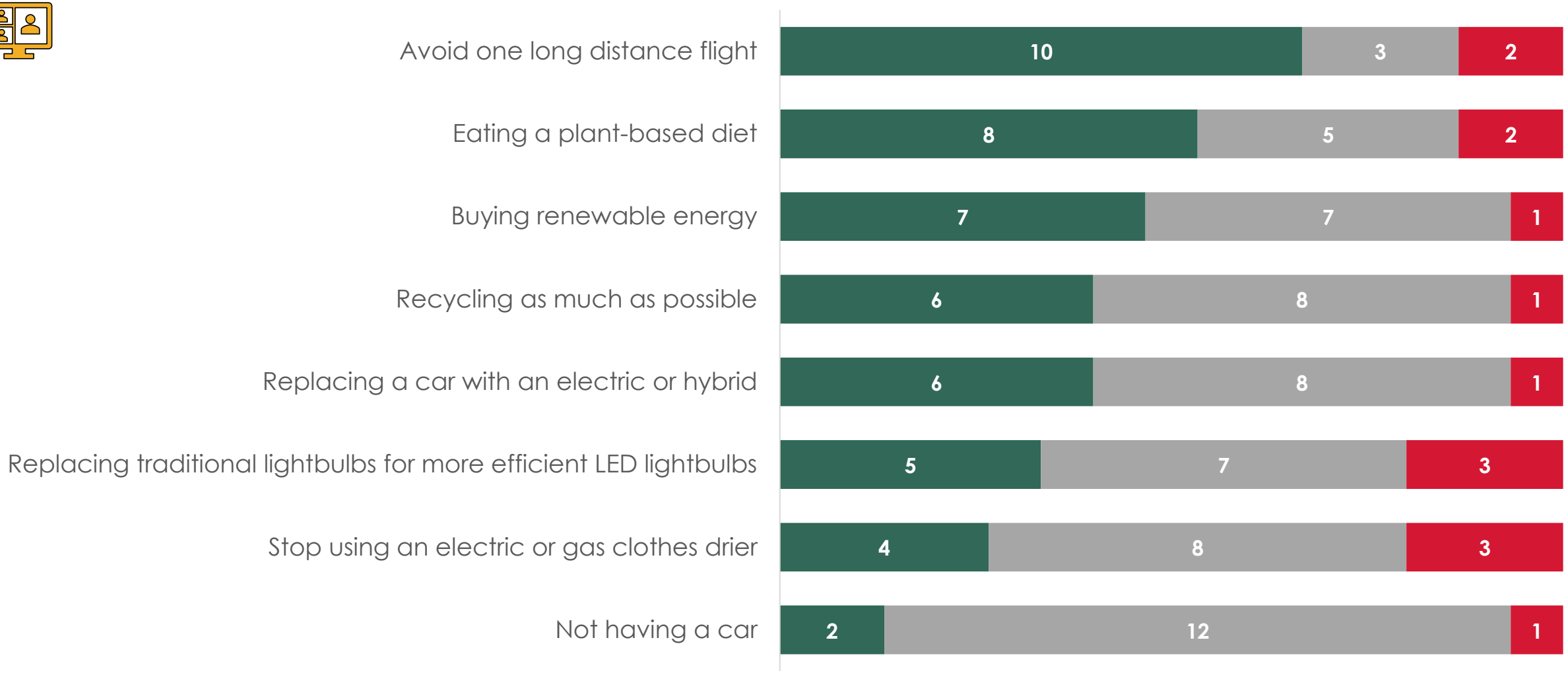
Most panellists have adopted 'easy' behaviours of recycling and replacing traditional lightbulbs to reduce their carbon footprint



Now say how likely you think your family/household is to do each of these as a way to reduce their carbon footprint?
Base: All panellists (15)

Once informed about the most impactful behaviours, most panellists felt they would adopt those with more impact; even so, most still remain reluctant to give up a car



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Does knowing this information make you more likely to consider any of the behaviours? For each, say whether you / your household will be more likely, less likely, or as likely to commit to this behaviour to reduce carbon emissions? Why?
Base: All panellists (15)

blue marble

Giving up meat or changing/getting rid of the car are seen as the hardest changes to make, there are plenty of reasons not to change if the environmental impact is doubted

CHANGING TO HYBRID OR ELECTRIC / NOT HAVING A CAR

- Cost of changing
- Lack of belief in the benefit of reduced emissions
- Loss of independent transport, especially in rural areas

"Electric/ hybrid cars are expensive, so they need to reduce in price in the next few years"
Future customer

"The general population may not be able to afford to just buy a new electric or hybrid car for the sake of reducing carbon emissions."
Future customer

ADOPTING A PLANT BASED DIET

- Lack of willpower or desire to give up the taste of meat
- Cultural norms
- Perception that vegans are 'different' → not me!
- Difficult to find food without animal ingredients

"Meat is delicious and, from personal experience, it takes massive willpower to be able to change your diet.
Future customer

"I think eating plant based will be hard for the majority of people to do as there is such a culture around eating meat".
Future customer

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Which of these behaviours do you regard as the hardest for people to do? Say which one and explain your answer
Base: All panellists (15)

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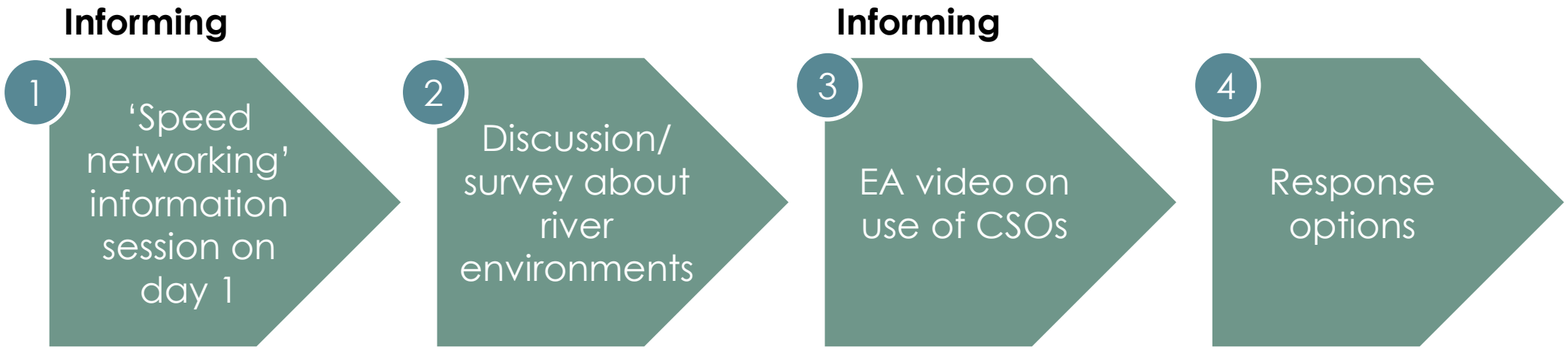
River environments

Information journey about CSOs, causes and impact



Issues around sewage blockages prevalent in their assessment of Wessex Water's top 3 Challenges

1 'Speed networking' information session on day 1

- Following a fast-paced immersion exercise, the panellists reported back on the themes that they felt were most important.
- Tackling sewer pollution and its causes - and educating the public – were new and salient themes

ENVIRONMENTAL ISSUES

Climate change the key challenge

Aim for net zero carbon emissions:

- Reduce diesel vehicles
- Increase use of electric & hybrid
- Use biofuel or electric buses

Encourage environmentally positive customer behaviours:

- Water butts
- Option for electronic statements

Improve water operations:

- **Monitors in pipes**
- **Reduce sewage flow into rivers**

PUBLIC EDUCATION

Tailor **to different ages** e.g. Schools & digital channels for young, future customers; Newspaper ads for older

Educate about blockages in particular:

- **Doesn't seem to be clear what is flushable or biodegradable**
- **Before the day, many students didn't know either**
- **Has a wide-reaching impact on the business**

Ensure campaigns are engaging

INTERNAL & INDUSTRY COMMS

- Diverse range of customers
- Internal departments communication between plants and departments
  - Grown a lot
  - Comms needs to be effective and quick
- Opportunity with other water regions/ companies
  - Share experiences
  - Share network

Widespread experience of local rivers – and pollution

River swimming is popular amongst this age group – which they perceive to be part of living in a rural region.

- Aware of swimming hotspots
- Experience of pollution (and other hazards such as glass and needles)
- One uses SAS app

Most Future customers **able to name their local river** and many had anecdotes of time spent there.

Crucially however, many associated them with **high pollution levels** (mainly from littering) and anecdotes of self and friends getting sick from swimming there.

Awareness of the problem fairly widespread:

- Some have seen news reports about pollution locally (e.g. Warleigh Wier); and on social media – including warnings not to swim.
- Some have seen sign boards at swimming/ paddleboarding spots.
- A handful have heard about river pollution from national sources: press, The Last Leg (TV)

But understanding of the causes less so

- No explicit mention of CSOs

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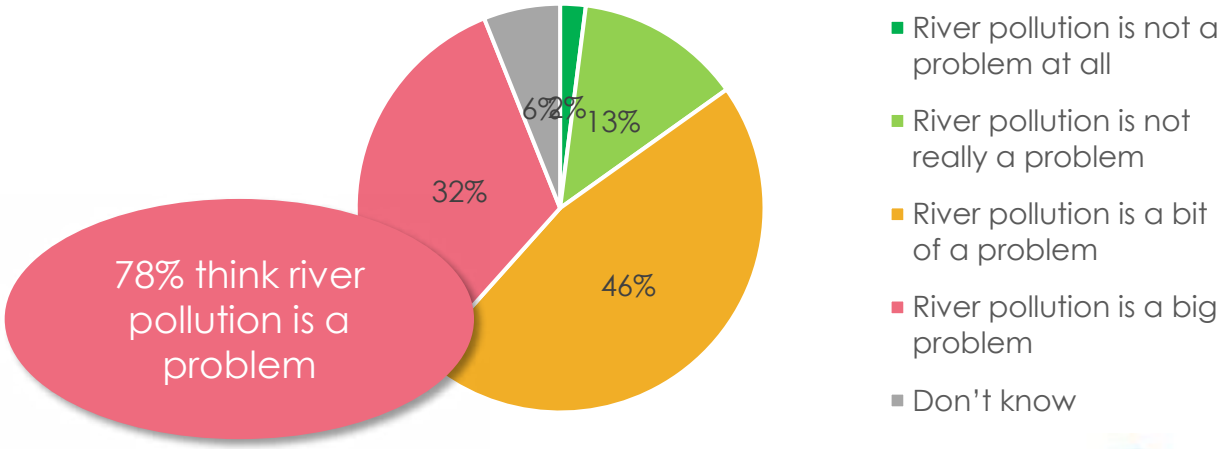
Rivers play a large part in the lives of future customers but most think river pollution is a problem and so they doubt the safety of local rivers

- Most future customers walk near their local rivers (84%) and almost half swim in them (47%)
- Even so, only 45% deem their local river safe enough to swim in and only 1 in 4 believing it is safe to submerge their head
- Nearly 8 out of 10 think river pollution is a problem

	Visited /used local river for in past 12 months
Walking by a river	84%
Sitting / relaxing by a river	61%
Swimming in the river	47%
Cycling by a river	43%
Having a picnic by a river	36%
Running by a river	33%
Paddling, cooling off or splashing about in the river	29%
Paddle boarding	25%
Feeding ducks	21%
Boating, canoeing or rafting	21%
Fishing	8%
None	5%

	Expect local river water to be safe enough for
Letting a dog swim in it	71%
Dipping your toes in it	64%
Using a paddleboard or canoe in it	63%
Going swimming in it	45%
Going fishing	44%
Letting children play in it	41%
Submerging your head under water	26%
Drinking from it	5%
None of these	6%

Local river pollution



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Over the last year, which if any, of these activities have you visited or used a local river for? Thinking about the **water quality** of your local rivers, which of these **would you expect** the water to be safe enough for? And which of the following describes your view on levels of pollution in your local rivers? Base: 2021 (326)

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The EA video shed new light on the issue for our future customers

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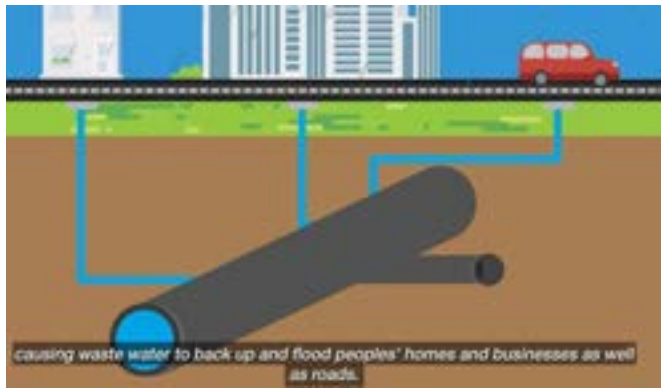
EA video on use of CSOs



What is a storm overflow and how do they work? - YouTube

"It is a necessary evil but steps need to be taken to reduce it."
Future customer

"I thought that 'fat' just related to the size of the blockages."
Future customer

"Some are constantly discharging so they need more treatment works."
Future customer

New understanding and surprise

- Sewer spills are related to heavy rain
- Surprise at age of pipes across large part of system
- Surprise that the problem has not been addressed
- That CSOs are managed as part of the system – and not accidents or malpractice: a release valve to prevent sewer flooding in communities
- That people's behaviour can help reduce this happening

However the information is undermined by hearing stories of constant or repeated discharges

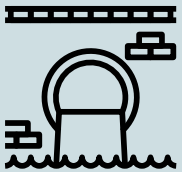
- And an overarching belief that releasing sewage into rivers is just a bad thing to do

Key insights with implications for communications

- The video informed (for the first time for many) about the impact of fats, oils and grease causing blockages
- This aspect had been lost in the much more prevalent communications about wet wipes
- Several talked about pouring fat being a common behaviour at home
- Awareness of 'Fat bergs' but not always associated with fat (rather that 'fat' simply describes the size of the blockage)

Once informed about CSOs, future customers view as an urgent issue that requires action

Spontaneous thoughts about what should be the response to CSOs



- Despite a greater understanding of the purpose and use of CSOs, future customers agree that use of sewer overflows is a **pressing matter in need of urgent solutions**
- Spontaneously, open to solutions including: raising awareness, updating infrastructure, innovative planning design and climate action
- **Solutions should be multi-faceted** with short term measures such as building awareness and education but also longer-term infrastructure projects
- In terms of responsibility they believed this is a **shared responsibility** but the onus is particularly with water companies and the government.

"It's a problem that shouldn't occur."
Future customer

"It is not an entirely avoidable problem but more should be done about it to prevent it."
Future customer

"We need something to stop gap it then you can move to long term."
Future customer

"I think that it is a major issue that needs to be addressed as it has a knock on effect on other things like business, economy and people's lifestyle."
Future customer

Prompted solutions suggest all parts of society have roles to play

4 Response Options

Customers seen to have an important role to play

- *'How can people engage if they don't understand?"*
- Not just flushing wipes (which they feel is widely known) but the FOGs message too

Town and household design part of the solution

- Slightly lower support for these types of solutions
- Questions about effectiveness, safety and cost
- Strong support for grey water – and initiatives such as free water butts
- Support new regulations for new buildings

Solutions with greatest impact

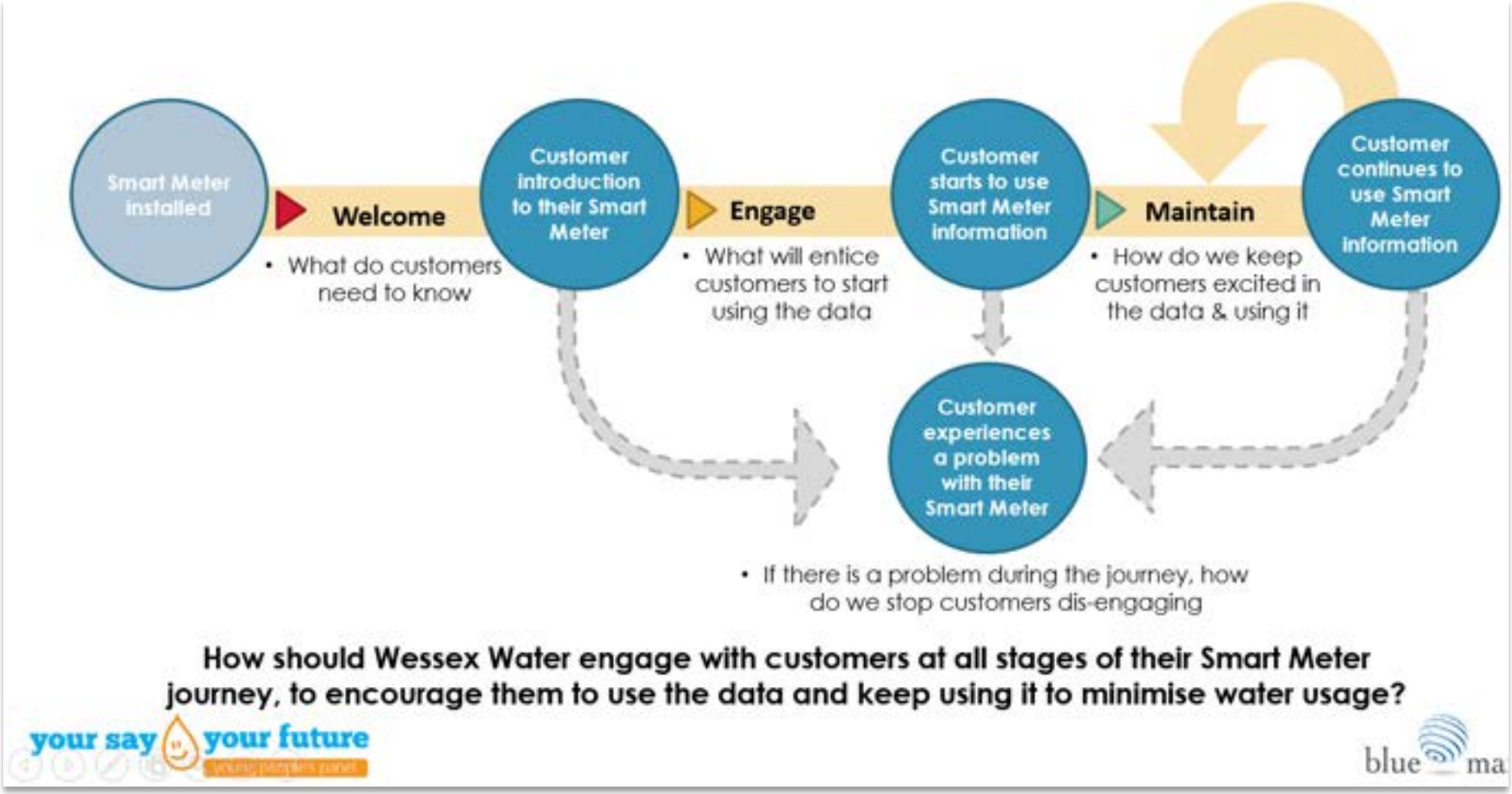
- Future customers conclude that the drainage system needs overhauling e.g. water storage on a large scale; pipe separation
- Awareness this is long-term and expensive though think it must be done

Smart meter roll out

The main task, smart water meters

We tasked our future customers with designing a new customer experience for smart water meters, asking them to consider optimising the experience at all stages of the customer journey

The brief, designing an innovative customer experience



We asked our future customers to design a new customer experience for a Smart Meter, focusing specifically upon:

- On boarding process
- Maintaining engagement
- Additional features
- Accessibility

They were also asked about the smart meter, particularly what type of data to show, how the data should be presented and what should happen if something goes wrong.

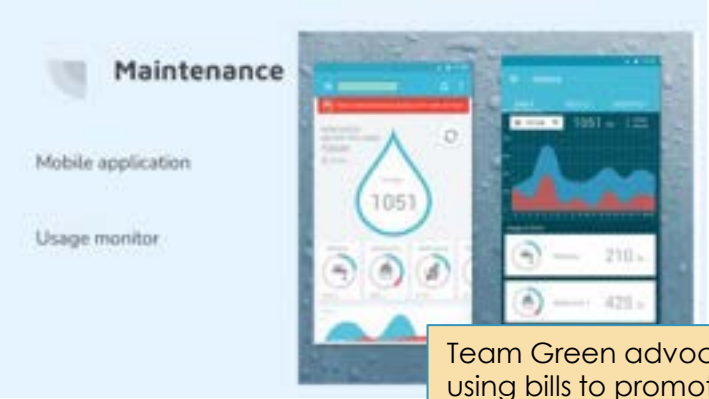
The presentations provided an insight into future customers' opinions.

Overall responses – how did future customers tackle the problem?

Four teams all worked to the same brief with some overarching themes emerging

- Future customers were unanimous in suggesting an **app** to access the smart water meter.
- Most presented ideas for a dedicated water meter platform containing **live water updates**
- Three out of the four teams recommended an **in-home device** in addition to the app
- They emphasised the importance of the **personality and positioning** of the smart meter
- **Accessibility** was also integral to rolling out smart meters, with features to suit all
- Finally, some teams suggested that to fully engage people, smart metering would need to include **aspects beyond water** e.g. linked to other utility costs, or including features/information that would be more obviously relevant e.g. local weather information.

Personality and positioning.
Future customers were keen to bring the customer into the heart of the smart meter operation with user-friendliness critical to success.
For instance, Team GREEN would design the meter to be like a 'friend'; and other teams similarly focused on making a tangible and friendly interface, appealing to the customer.



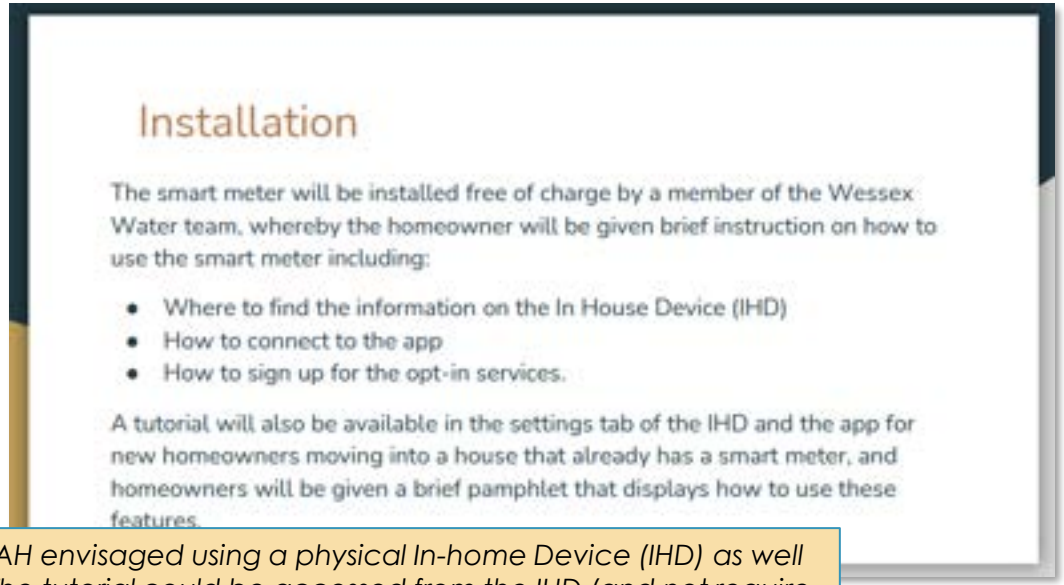
Team Green advocated using bills to promote water saving messages rather than what they saw as 'adversarial bills'.

Team JEMGAH designed 'Ripple', their in home device. The design includes innovative features such as interactive touch screen: creating a compelling interface that would encourage customer engagement

WELCOME: a simple process is needed supported by service back up and clear guidance

Future customers highlighted the importance of the on-boarding process, reflecting the likely barrier to use/engagement if the technology is not easy to use. They focused on two aspects:

- **Installation:** this will require clear communications and help where needed from Wessex Water personnel
- **Tutorial:** As the technology will be new to many, an online tutorial will be beneficial, advising how to set up and make the most of the smart water meter



Team JEMGAH envisaged using a physical In-home Device (IHD) as well as an App. The tutorial could be accessed from the IHD (and not require customers to download the App)

This team also highlighted the need for onboarding new occupants where a smart meter is already installed.

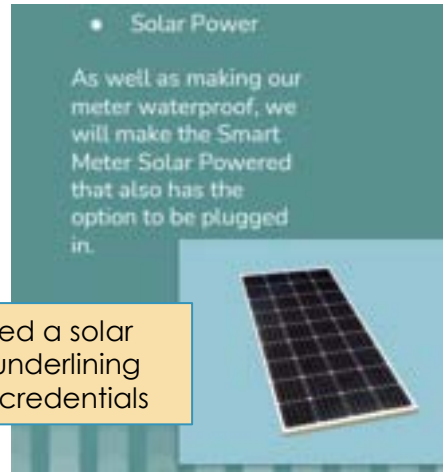
Team Azul describe their Welcome System, introducing customers to smart water meters.

They recommended a leaflet - accessible either online or as a physical format - containing all the necessary information e.g. setting up the device, key features, customer service contact details and a feedback page

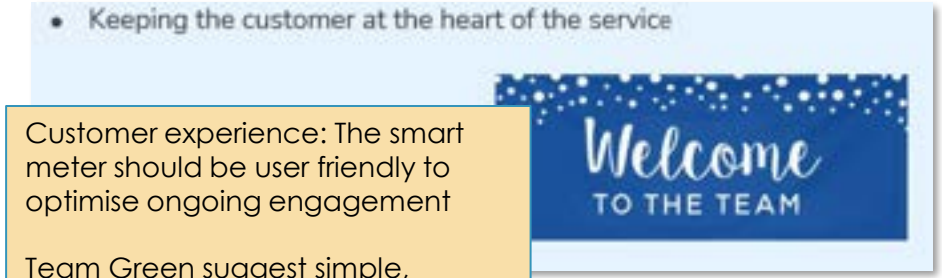
ENGAGE: Future customers identified key areas to establish customer engagement from the outset

Future customers designed a smart meter programme to provide tangible benefits to the user:

- Make it **user-friendly and enjoyable**: interface and data should be presented in a way that is easy to read and personalised
- Promote **incentives:** e.g. how reducing usage can have rewards and communication on any reduced bills/saving
- **Environmental:** if the environmental benefits of water saving are clear, customers will be more engaged.

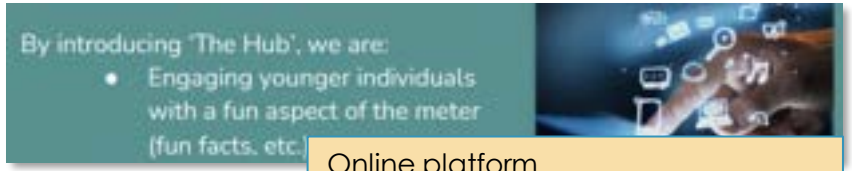


Team Azul designed a solar powered meter, underlining its environmental credentials



Customer experience: The smart meter should be user friendly to optimise ongoing engagement

Team Green suggest simple, interesting communication about household water usage. Personalisation is also key with features like adjustable font size and frequency of communication.



Online platform

Team Azul recommended an online 'hub' or platform for achieving initial engagement. This would be a simple, centralised and easily accessible hub for smart meter data, and include fun features aimed at a younger audience.

MAINTAIN: Additional smart water meter features were identified to help maintain engagement

Future customers believe additional features are vital in stimulating ongoing engagement with smart meter data:

Benefits:
- Ongoing incentives/ rewards for usage targets
- Linking rewards for 'good' usage to charity donations

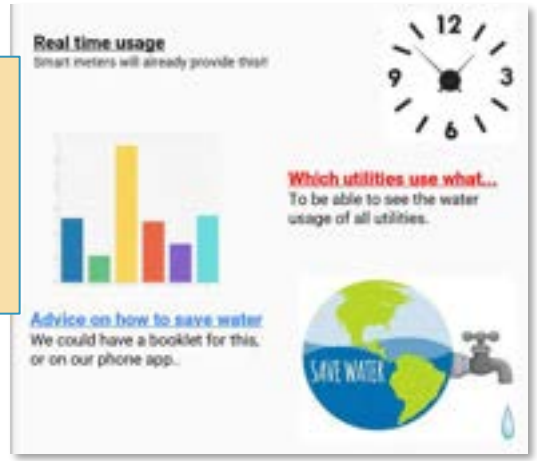
Customer experience:
- Offering water saving advice
- Giving real-time water usage
- Providing other services to encourage more frequent visiting the app/monitor e.g. weather updates
- Excellent customer support if something goes wrong

Platform/device:
- A shared platform e.g. with gas and electricity data
- Platform accessible through an App
- Waterproof device: see usage as you use water

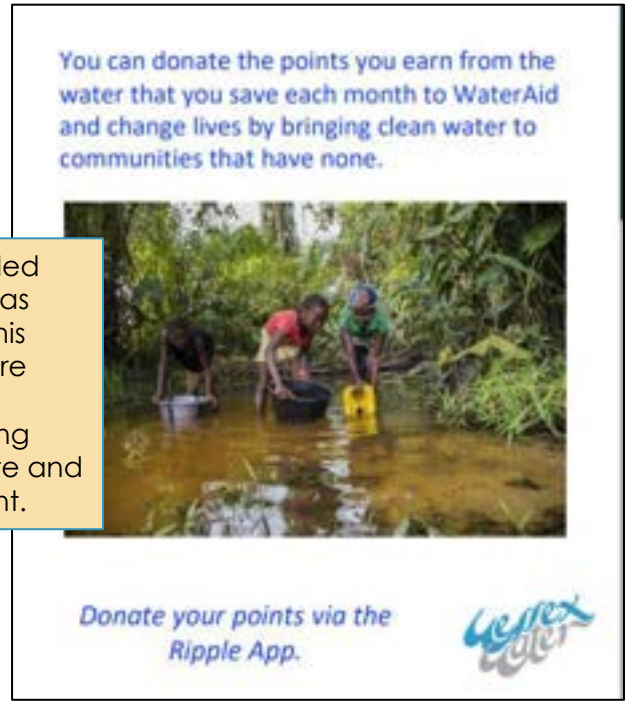
User incentives/rewards
As well as suggesting incentivising water reduction through discounted bills or charitable donations. They also emphasised 'gamification' through simple features such as having water saving targets - and badges for meeting them.

Team JEMGAH built in a 4% discount on water bill for household customers who save 20% or more on water usage. Financial incentives are key to future customers for maintaining meaningful meter engagement – but non-financial rewards could also be useful.

Team YELLOW included water advice and real time usage, broken down into individual utilities. This more granular of information would maintain interest in the smart meter data.



Team JEMGAH included charitable donations as part of their design. This was popular with future customers who recommend partnering with charities to create and maintain engagement.



your say your future
young people's panel

blue marble

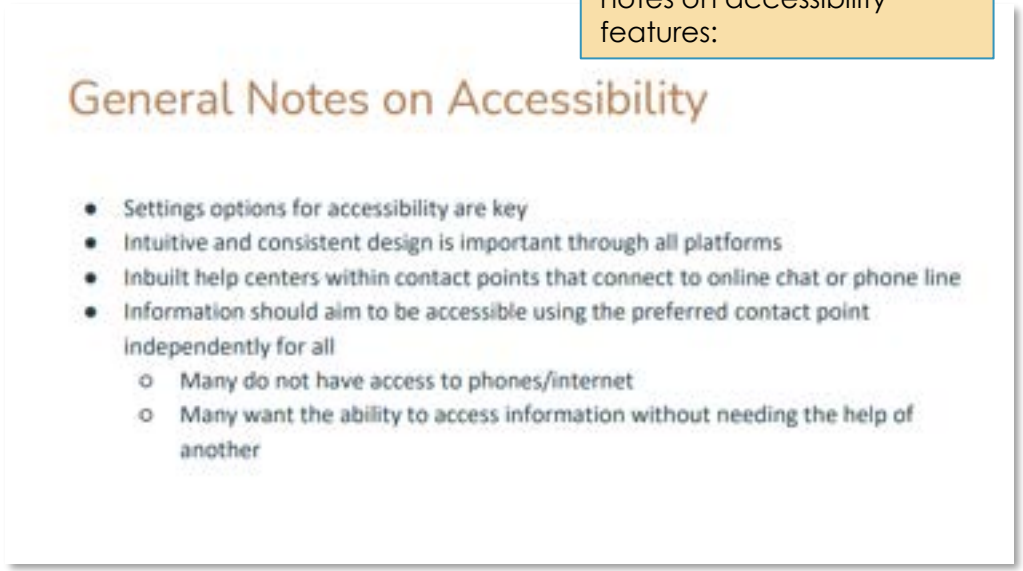
Smart meter accessibility was an important consideration for our future customers

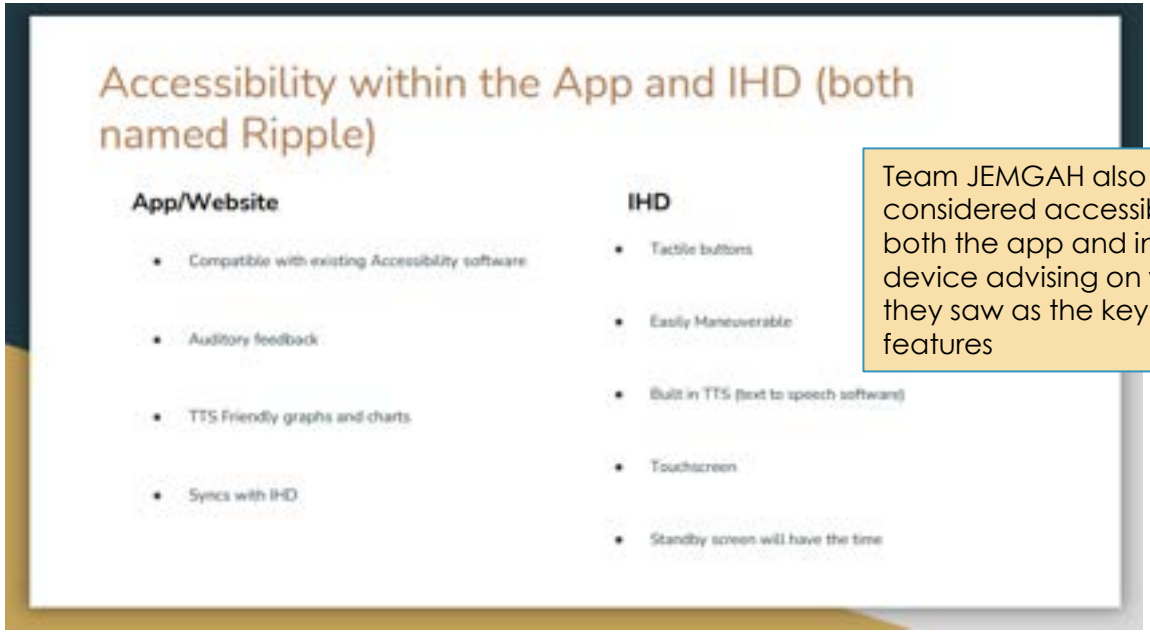
Accessibility was very important for our future customers. Ideas included:

- Audio and large font options for visually impaired
- Touch screen
- Text to speech software (TTS)
- Opt-in paper options for some services
- All features must be inclusive of different customer groups

Inclusivity was an important consideration for future customers. They emphasised how different ethnicities, technological capabilities and cognitive or physical disabilities could mitigate customer access – and ability to use less water.

Team JEMGAH provided notes on accessibility features:

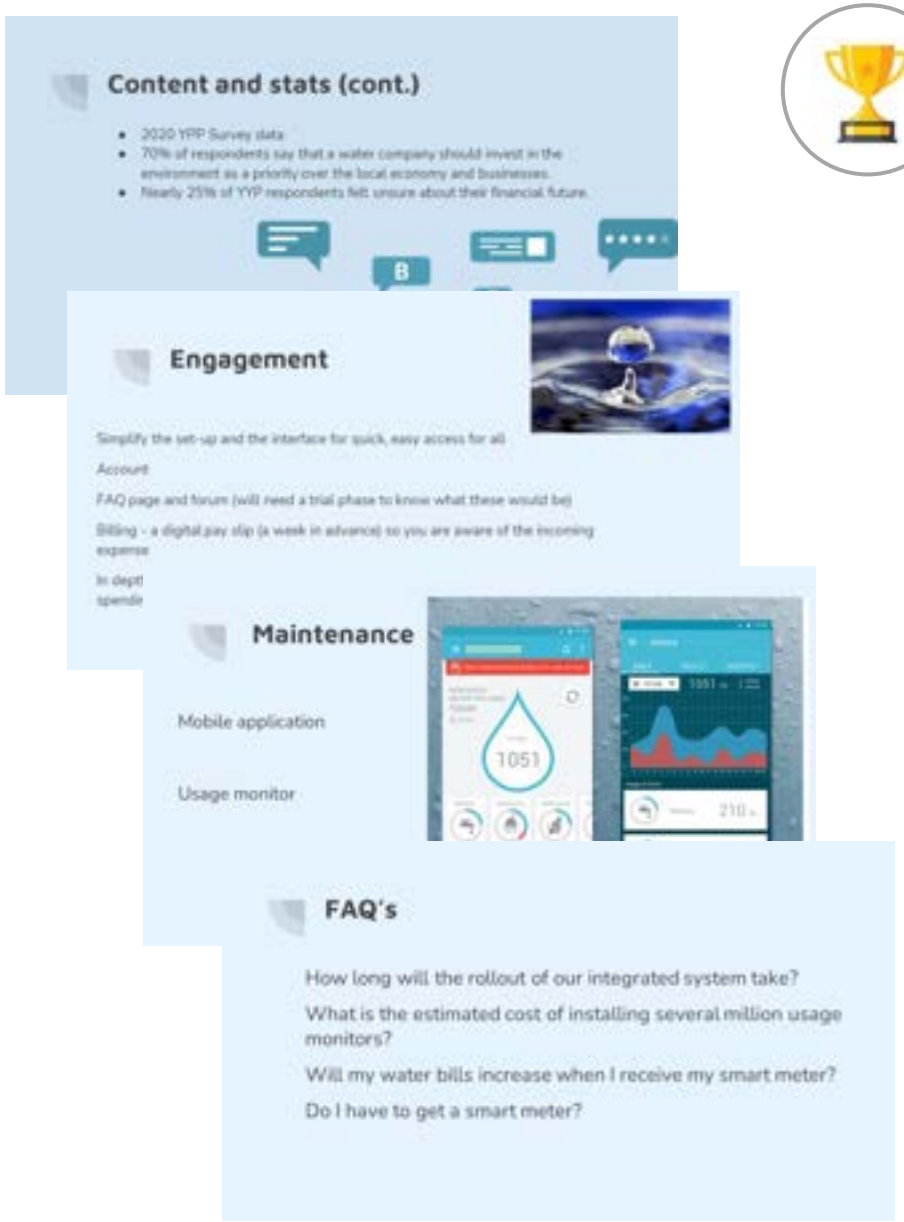




Team JEMGAH also considered accessibility in both the app and in-home device advising on what they saw as the key features

Summary of team presentations and judges' responses

Team Green – the winning team



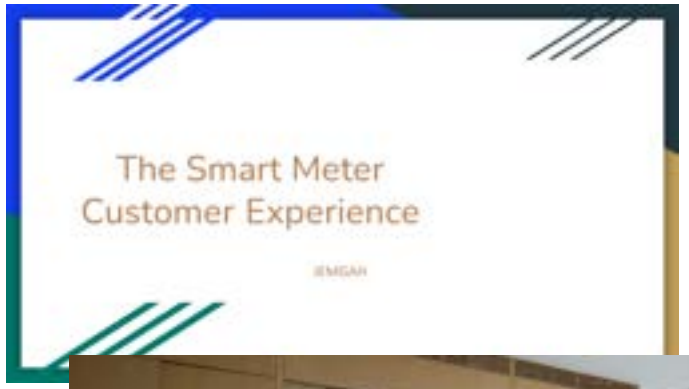
Key features the judging panel liked about team Green's presentation:

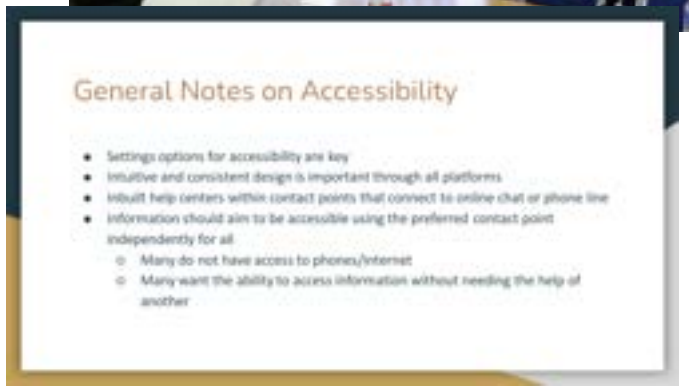
- Consideration of wider issues, CSOs and perceptions in the media
- The tag line 'only spend what you use'
  - Smart metering save you money
- The suggestion of taking small steps
- Good inclusion of research
  - Including YPP 2020
- FAQs capturing
  - Costs & timeline of rollout
  - Move away from adversarial bills to a water saving message
- Inclusivity – recognition that some households need to use more water through no fault of their own, e.g. health issues

Presentation summary:

- Engaging and inclusive welcome plan
- Transfer customers to App interface
- Provide customers with data comparisons
- App maintenance
  - Specialised team of software experts
  - Long-term integrate all water data to the App

Team Jemgah



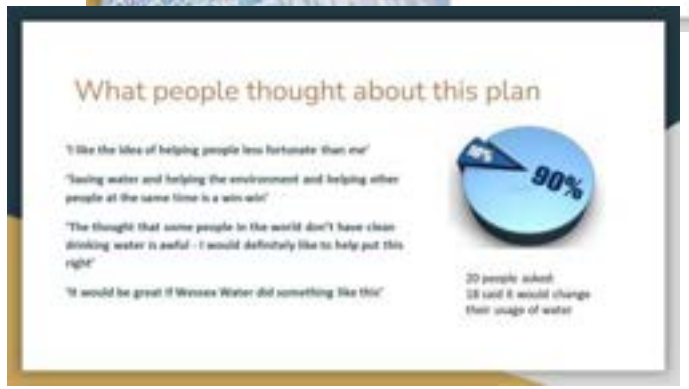


Key features the judging panel liked about team Jemgah's presentation:

- The device name, 'Ripple'
- Research conducted before and after the team's ideas were developed
- Recognition of different types of customers / segmentation
- Long term use of reinforcement/rewards:
  - Competitive aspect comparing progress
  - Charity links and incentives
- Charity partner ad

Presentation summary:

- Smart meter data on a device ('Ripple') or an App
- Providing real-time water usage and information on customer bills
- Customer incentives:
  - Online badges
  - Charity based long-term incentives



your say your future
young people's panel

blue marble

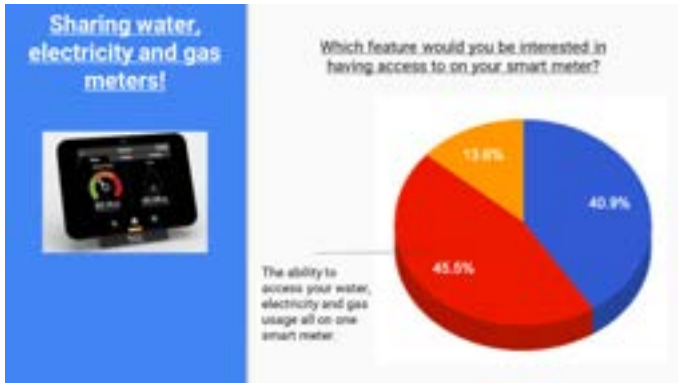
Team Yellow

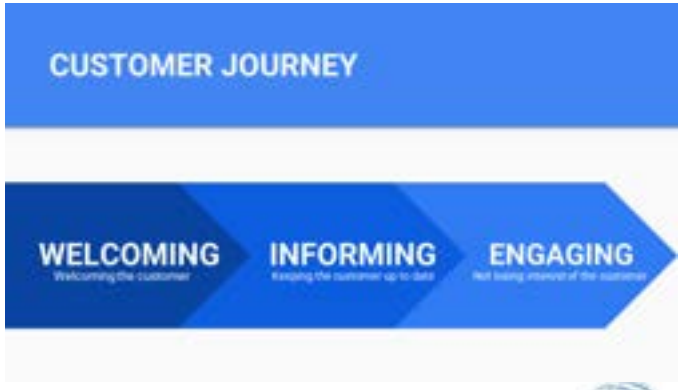
Key features the judging panel liked about team Yellow's presentation:

- The team took a broader, holistic view
- Incorporating gas and electric into the same Smart meter with water is:
  - More useful for the customer
  - Demonstrates working in partnership with customers
- Usage data:
  - Providing water use per appliance
  - Minutes of usage
- Inclusion of research from other countries
- The preparation of a mock-up leaflet

Presentation summary:

- Benefits of smart meters for customers
- Engaging customers with usage feedback
- Welcoming customers to their smart meter
- Features customers would like:
  - Water, electricity and gas in one meter
  - Availability of an App
  - Ability to adjust App font size
  - Advice on saving water





your say your future
young people's panel

blue marble

Team Azul

Key features the judging panel liked about Team Azul's presentation:

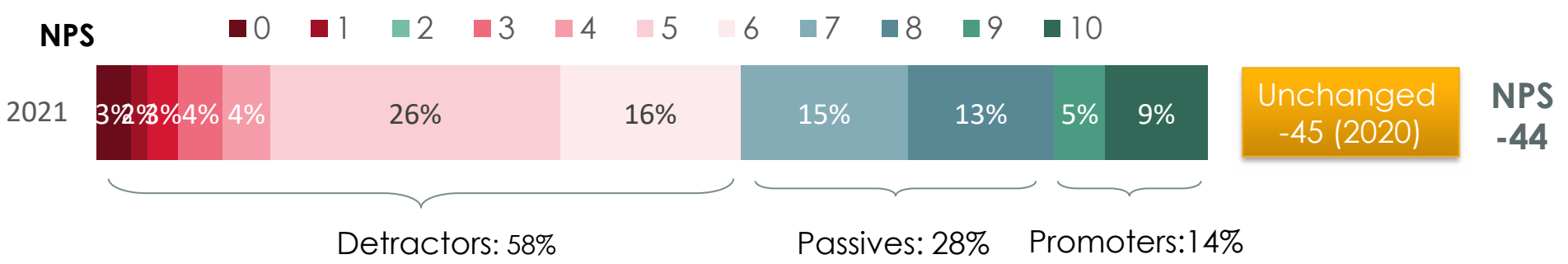
- Describing the meter as a 'friend'
  - That would help, encourage and reward customers
- The broader research the team conducted about other Apps
- The device design:
  - Solar powered device
  - Waterproof
- The goal to keep usage alive in the longer term by maintaining engagement with customers beyond water e.g. weather

Presentation summary:

- Researched customers to understand their needs
- Solar powered Smart Meter device to address environmental concerns
- The Hub (in addition to water usage data) to engage all ages of customers
- An App to complement smart meter device
- Provide a welcome system accessible to all

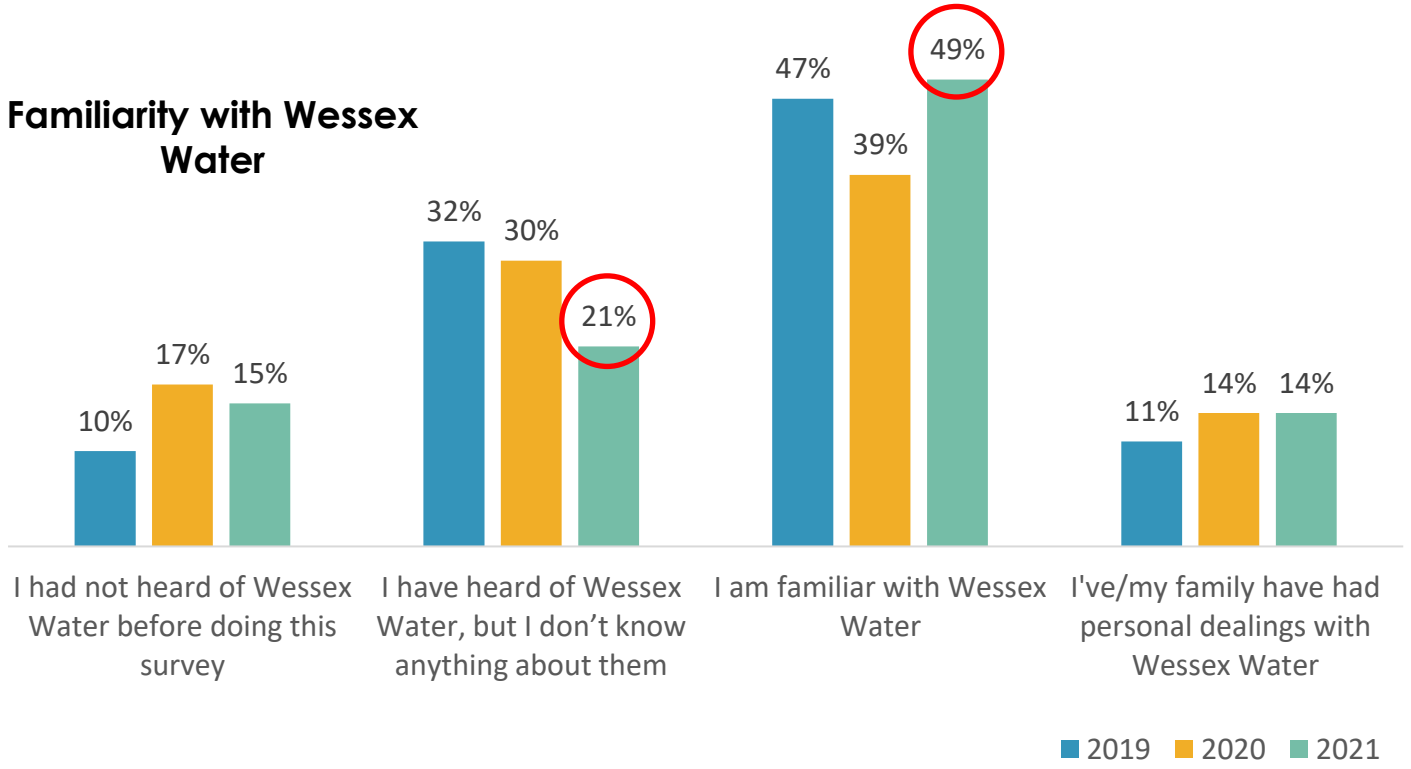
Interventions, behaviour change & communications

Future customers are aware of Wessex Water but do not know it well enough to rate it highly



- In our survey, future customers' familiarity was again at 2019 levels, with nearly 1 in 2 being familiar with WW
- NPS is unchanged, with more detractors than promoters, and a score of -44

"I've put 5 since that's mutually good and bad - I have not had an experience with Wessex Water, so I have no reason to praise or dislike."
Future customer



your say your future young people's panel

Which of the following reflect your awareness of Wessex Water? How likely are you to describe Wessex Water as a good company to someone you know? Base: All respondents 2020 (555) / 2021 (326)

blue marble

Before participating in YPP, most hadn't thought about what is involved in supplying water

Day 1 prevailing attitudes towards water generally

- Take water for granted!
- Many believed water system was simpler than it was – were unaware of environmental ties, regulations and complicated infrastructure involved
- Not thought of water in-depth before – it's always just there!
  - Now feel guilty about water wastage, find it hard to comprehend the amount of water they use
  - Also taken aback by how pertinent water is to their lives – issues that affect them all
- Perception that there's a lot of crisis management (e.g. hose pipe bans), they don't hear about crisis prevention

"Literally the only thing I thought was a water company was a few people that ran it with a few engineers running pipes."
Future customer

"I just think I need a drink and I don't think about much more."
Future customer

"At first it seems really simple like providing water but then it seems really complex."
Future customer

"They deal with so many things that are common things in our lives."
Future customer

Once informed, future customers fully back the idea that we need to be more water conscious

Future customers most energised by the need to communicate about **sewer blockages**

Because they lead to
- Polluted rivers
- Higher bills

Also see the urgency for people to be more **conscious about water consumption**

Linking climate change to
- Water shortages
- Flooding

High motivation to support behaviour change around specific activities that reflect their existing habits:

- **Future customers already claim to**: never flush wet wipes, tampons, cotton/wool buds etc down the toilet and never wash up with a running tap.
- **However, they are not comfortable about**: reducing the number of toilet flushes per day as well as taking at least one shower fewer per week and reducing time spent showering.

According to future customers' self reported behaviour, flushing the wrong things down toilets is not something their generation does.

Household/kitchen wipes are the most commonly used among future customers and, although only a few people, baby wipes seem to be the most multi-purpose, having a wide range of uses

Usage of wipes in the household

	Face cleaning / make up removal	When going to the toilet	Bathroom cleaning	Kitchen / general household cleaning	Cleaning floors	Do not use
Household / kitchen surface cleaning wipes			1	10		5
Face / Make-up removal wipes	7					8
Floor cleaning wipes			2	3	5	9
Moist toilet wipes		3		1	1	11
Toilet cleaning wipes		2	3	1		11
Baby wipes	1	1	2	2	1	12

Wipe disposal

Always flushed	Sometimes flushed, sometimes binned	Always put in the bin
		10
		7
		5
1	2	3
	2	3
		2

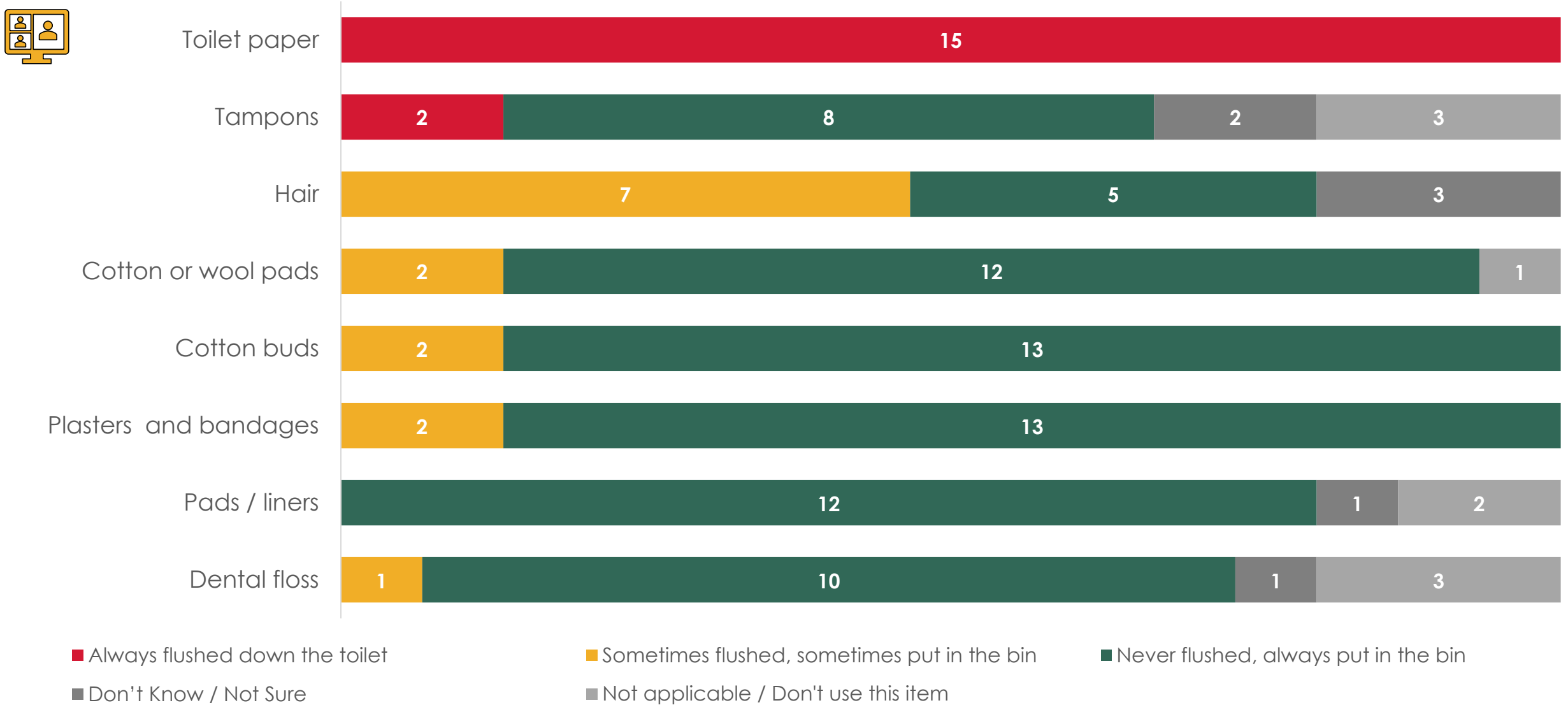
NB: None of the panellists use toddler training wipes

your say your future young people's panel

First of all, we'd like to know how your household uses disposable wet wipes... Please tick all the activities your household uses each of the following wipes for; if you're not sure, perhaps try chatting to someone else in your house. If your household doesn't use a particular wipe please select the last column, 'Do not use'. And in terms of the wipes your household uses, how are these wipes disposed of... If your household doesn't use a particular wipe, please select the last column (Not applicable / Don't use this item)
Base: All panellists (15)

blue marble

The message to bin rather than flush seems to have got through with most but there is opportunity to reinforce the message with some uncertainty about a few items



your say your future young people's panel

In your household, how are each of these other common bathroom items disposed of? Base: All panellists (15)

blue marble

The goody bags, what happened next…

Gunkpot – most panellists hadn't used this item but intended to in the future

Leaflet – most panellists had used this item and wouldn't use it again

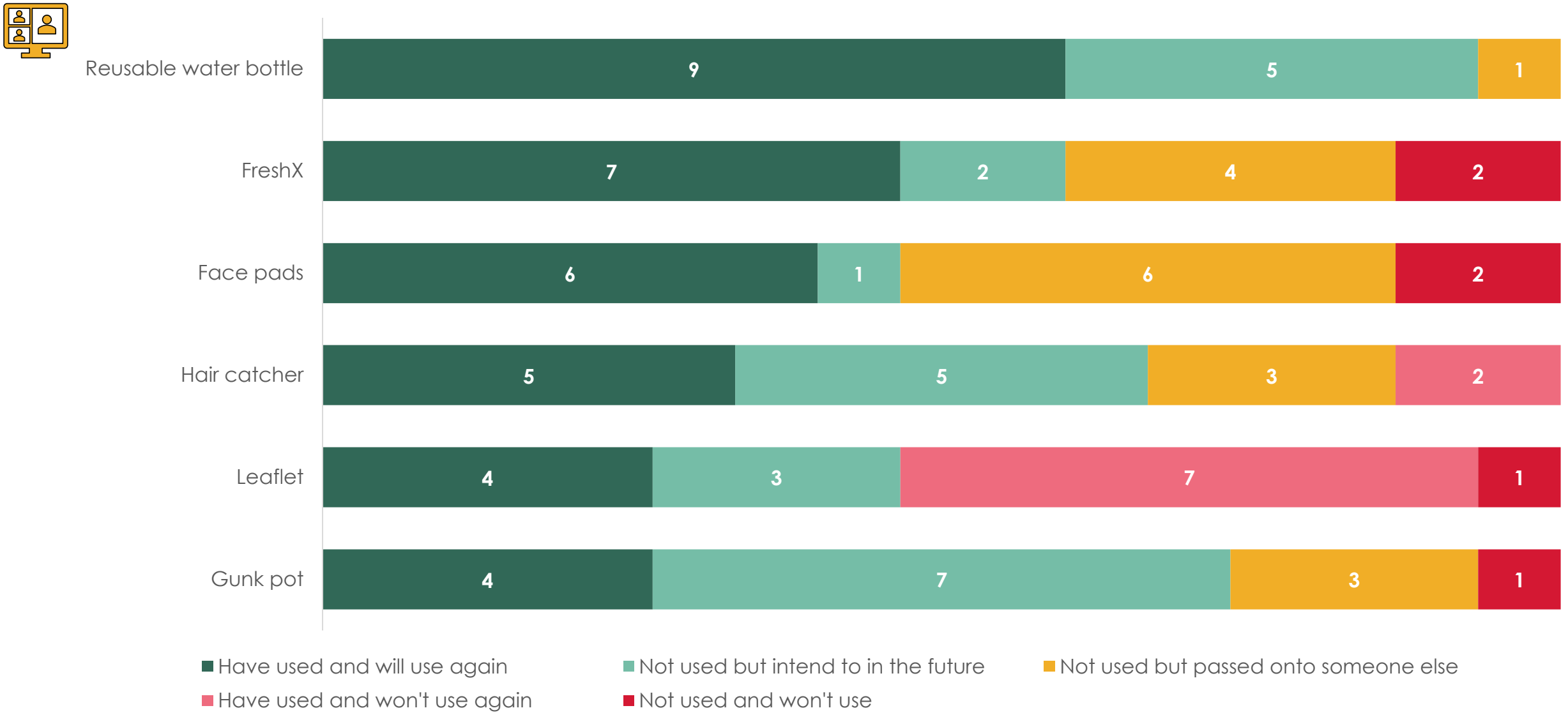
FreshX – this was the second most already-used item. It was also the second most likely to be passed on to someone else

Hair catcher – most panellists had either already-used this item, or hadn't yet but intended to in the future. Only two panellists had already used this item and wouldn't do so again

Face pads – many panellists had already used this item. Many also had also passed on the item to someone else

Reusable water bottle – this was the most already-used item. The majority of panellists that hadn't used it intended to do so in the future

Of all the items in the goody bag, the reusable bottle stands out as the item with greatest universal appeal; the leaflet has also reached most but it's not going to be kept



Thinking about the pack of items (Gunkpot, hair catcher, FreshX, face pads, reusable water bottle, leaflet) you received in your goodie bag, which statement best describes your use of each item? Base: All panellists (15)

The items in the goody bags were informative and encouraged new behaviours from our panellists

Face pads:

- Panellists that had used the face pads found them **'extremely useful'** and easy to incorporate into their daily lives
- They also reported that previously they **did not know** that reusable face pads existed and that since using them they had **'saved a lot of money'**

Hair catcher:

- Panellists that had used the hair catcher found it **simple and easy to install** and useful in preventing their drain from getting blocked
- Some panellists were **surprised at the amount of hair** the hair catcher prevented going down the plug.
- Despite this, the hair catcher **did not fit all** panellists baths or showers, which prevented some from using the item

Leaflet:

- Panellists found the leaflet **informative** in letting them know what shouldn't be flushed down the toilet

FreshX:

- Panellists that had used the FreshX spray reported that it had helped them to **cut down on wet wipe usage**

Gunkpot:

- Panellists reported that the Gunkpot encouraged them to **stop throwing fats and oils** down the sink

Reusable water bottle:

- Despite being the most already used item, panellists had **little to say** about the water bottle other than it being 'really nice'

"All of the items are great and have been very useful in helping me to learn new ways to help the environment."
Future customer

"These items can all be used to prevent things like hair, wipes, fats and oils from entering our sewer systems as the combination of all these items leads to blockages."
Future customer

"Thank you for all the nice stuff!"
Future customer

your say your future
young people's panel

blue marble

Response to the pop art post were generally positive, with panellists rating it on average 7.6 out of 10

- Panellists reacted **positively** to the 'Wipe Out Wipes' title, commenting that it was 'catchy' and 'easy to remember'.
- Similarly, they thought the blue box was **informative**, although some thought the data was unclear with one panellist commenting that they were unsure whether 99 sewer blockages a year is a lot.
- The soiled toilet bowl had more **mixed reviews** – some panellists thought that it was unpleasant and 'graphic', although some also conceded that this would persuade the viewer to stop using wipes. Many others concurred with this point – that the image illustrates the negative consequences of flushing wipes.
- Most panellists **like the image** of the screaming and shocked woman, commenting that it was 'eye-catching' and 'engaging'.
- Panellists reacted **positively to the wet wipes**: they clearly showed what the cause of the issue was.
- Some panellists wanted to see **more details** on what reusable products consumers could switch to instead of wipes, although most saw this piece of information as useful and presenting a solution to the issue.

> *"I think it is always good to include some statistics, it gives the poster some reality."*
> Future customer

> *"[It's] not appealing to the customer, however it does show the negatives to flushing wipes."*
> Future customer

> *"[They] could potentially give some ideas on what people could switch their wipes for."*
> Future customer

blue marble

Response to the Facebook post were more negative, with respondents rating it on average 6.3 out of 10

- Responses to the text at the top of the post were **mixed**. Many thought the text was 'bland', 'boring', 'not very persuasive.' Others described the text as 'informative', 'clear', and 'concise'.

"Informative but a little boring."
Future customer

- Many responded **negatively to the image** of the Goodie Bag items. Above all, respondents stated that it was not clear what the items in the image were and more information was needed.

"It is really difficult to know what the items are with just the photo and no explanation."
Future customer

- A few recommended taking the pamphlet out of the image as the words were **illegible** and therefore it was 'pointless' and 'distracting' to include it.

- Use of the word **'free' was received** positively: it is likely to attract people to the advert and encourage them to order the Goodie Bag.

"What are these items and why should the customer want them?"
Future customer

"Everybody loves the word 'FREE', I think this does a very good job to attract attention."
Future customer

blue marble

In conclusion

What have we learned about future customers in 2021?

Mood of the moment

- While the pandemic has had some positive benefits for society and family life, concerns about the impact on young people's mental health and wellbeing remain much higher than pre-2020
- Specifically, this age cohort call out the negative impact on their education (and their antipathy to online learning)
- We also see increasing pessimism about their long term financial prospects, reflecting a more uncertain economic outlook generally

Environment & climate

- Future customers are more emphatic in their concern for the environment when compared with general population views – but are similar in seeing micro plastics & air pollution as the biggest issues
- In contrast to the adult population, future customers appear more concerned about loss of habitats and biodiversity – but a little less concerned about river pollution. This might be a stronger messaging idea for younger audiences?
- Echoing other recent research, young people are not clear about which personal actions will have the most impact in tackling climate change. However, unlike adults they are open to adopting some of the higher impact choices (e.g. avoiding one long distance flight and eating a plant based diet). Although like adults, they are reluctant to not having a car. Perhaps they want the same opportunities and experiences as generations before them?

What have we learned about future customers in 2021?

River pollution

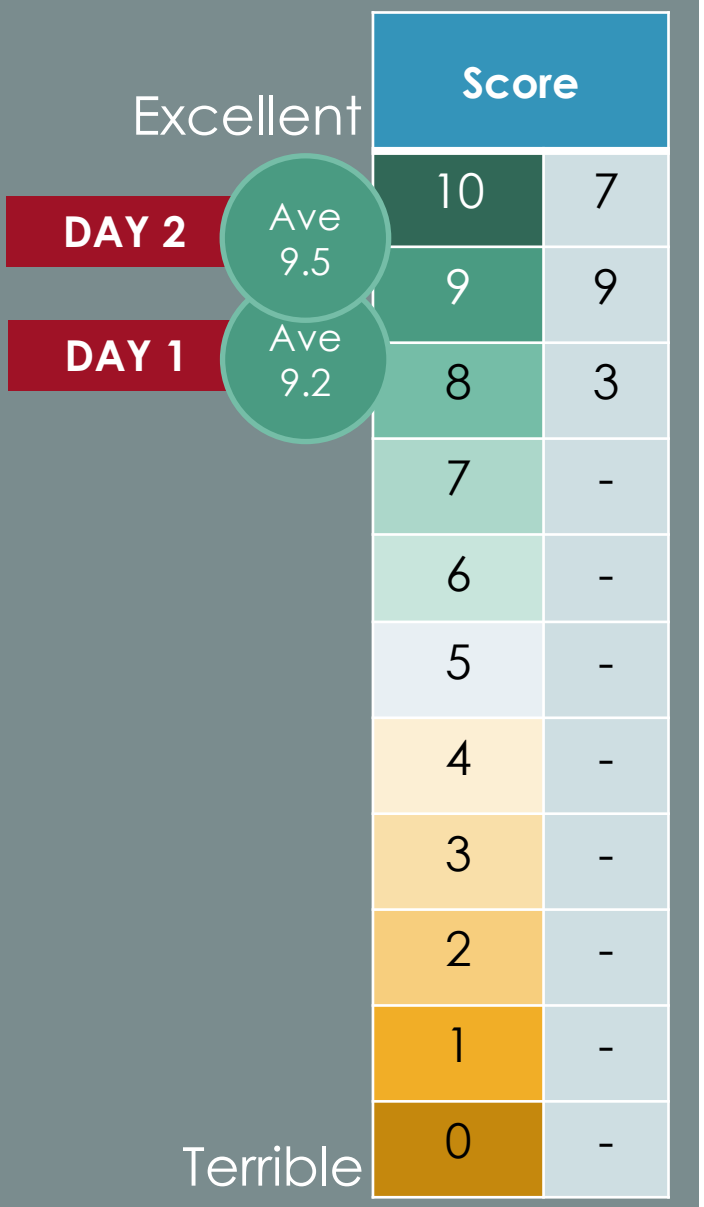
- Future customers in the Wessex region are (almost) all river users in some form, and almost half have been river swimming in the last year
- Perhaps unsurprisingly therefore, 8 out of 10 think river pollution is a problem – but awareness and understanding of the causes of pollution are not understood
- With the benefit of immersion sessions and briefing on CSOs, future customers believe this should be a major focus for investment
- Though they also think wider society has a role: consumer behaviour around flushing wipes and pouring fats; and town planners/developers in building more sustainably for drainage purposes. (To date, the FOGs message has had little cut through with this customer segment)

Wessex Water

- Young people are entirely removed from the world of water and waste services: the YPP experience is revelatory for them!
- Once they understand the impacts of climate change on a water company they are more engaged
- The pitch presentations convey future customers' desire for more accessible, friendlier, consumer-centric and ethical communications
- This was reinforced by their preference for the 'pop art' social media example
- They see the YPP initiative conveying a future-thinking company (as do their schools)

"We were delighted that XXX and XXX were selected to take part and I know they are valuing the experience."
Deputy Head – Sixth Form

YPP 2021 received 'best-ever' feedback scores!



- The 6th year, the YPP is clearly valued by the panellists – and schools support it
- Very positive feedback: a learning experience on many levels: the world of work and water, collaborating with new people, a team challenge, meeting senior industry figures
- Each year we learn and evolve: implementing more interactive elements and ice breakers worked well
- Very few could suggest improvements this year: some would like more hands-on help between meetings and more engaging control room activity

- Interesting and enjoyable
- Learnt about Wessex Water
- Well organised
- Learnt about water usage
- Great judges feedback
- Interactive and mature

"It was fun, met lots of nice people, learnt a lot."
Future customer

"Was very informative and I learned a lot about the huge amount that Wessex Water does."
Future customer

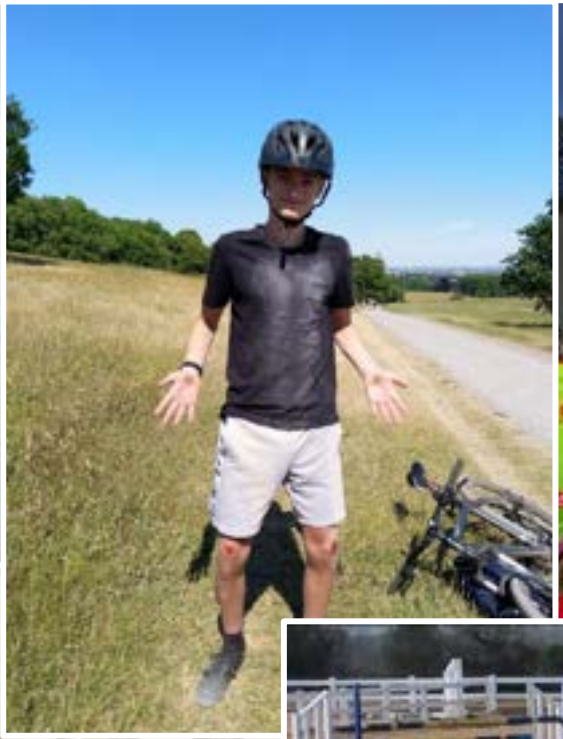
"Setting this up to listen to young people and young people's ideas show that they are interested in young people and looking forward."
Future customer

"Clear explanation of the tasks and information. Clean rooms and good refreshments and lunch."
Future customer

blue marble

Appendix

We had an interesting and dynamic group of students taking part this year








your say your future
young people's panel

Upload 2 photos - one of you and one that represents your life / lifestyle (e.g., a favourite place, activity, or possession).

blue marble

Most feel they are part of the community where they live as a result of their own participation

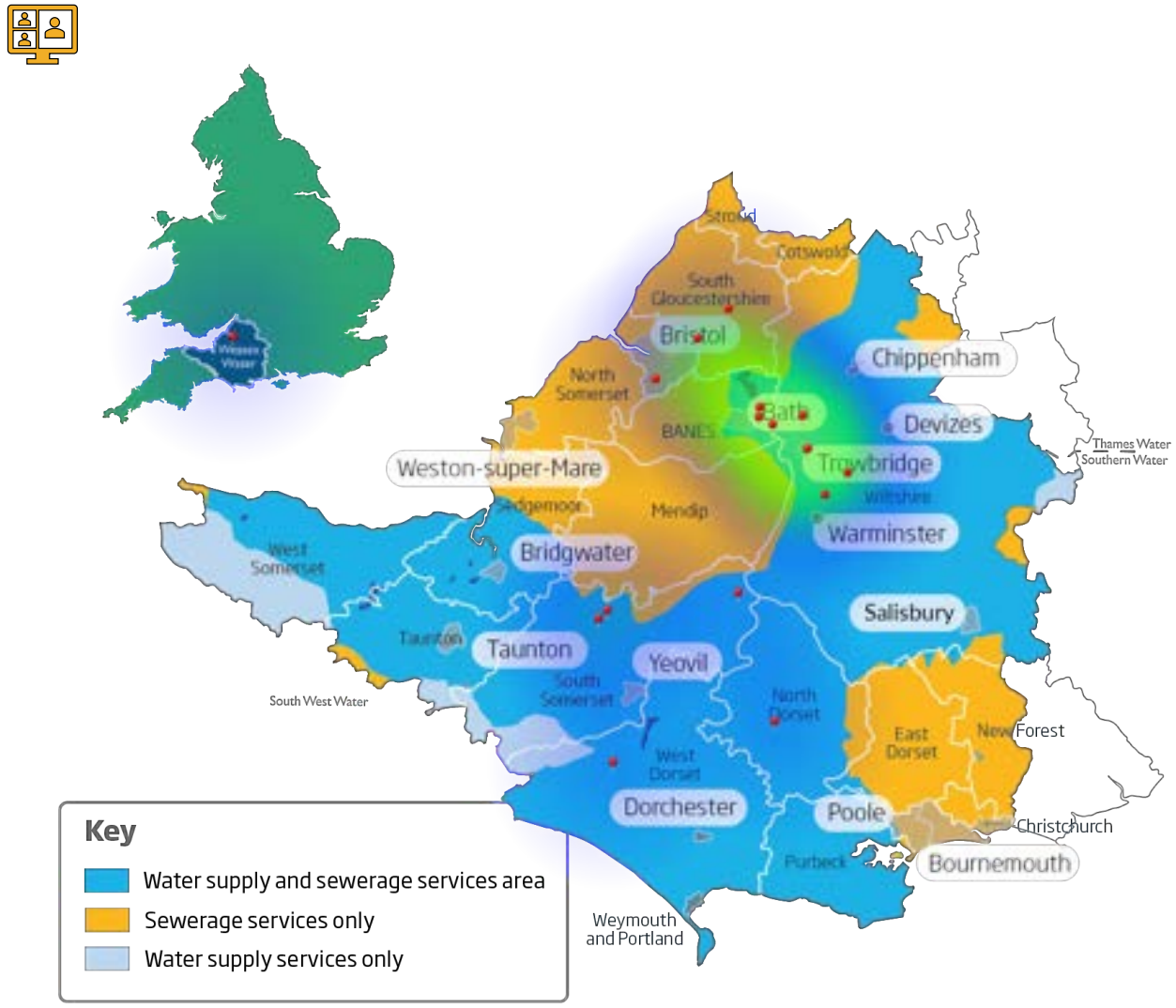
Being connected **influenced** by:

- ✓ What people do in the community e.g. taking part in community kitchens or village competitions and shows
- ✓ Length of time lived in a place
- ✓ Identifying with the character and culture of the town/village / feeling proud to be part of it
- ✓ Sense of friendliness amongst neighbours and the wider community
- ✓ Availability of areas to mix and get together, such as parks and shops

People **can feel disconnected**:

- × Some rural areas have few neighbours and lack a community feel
- × Cultural differences make it difficult for people to connect

But, **not everyone wants to be connected** to the local community – they value the peace and quiet of rural living



your say your future young people's panel

Finally, on a different topic, place the pin where you live on the map. How connected do you feel to your local community? Give a score out of 10 where 10 is very connected and 1 is not at all connected. Please tell us why you have given this score.

blue marble

Online education dos and don'ts: future customer advice to the education team

DON'T

- × **Overload with information**
- × **Lecture/talk at** people
- × Use **boring, long** tasks
  - × Lose concentration, or switch off during tasks like this
- × Use **breakout rooms**
  - × Experiences in school lessons negatively impacting perceptions

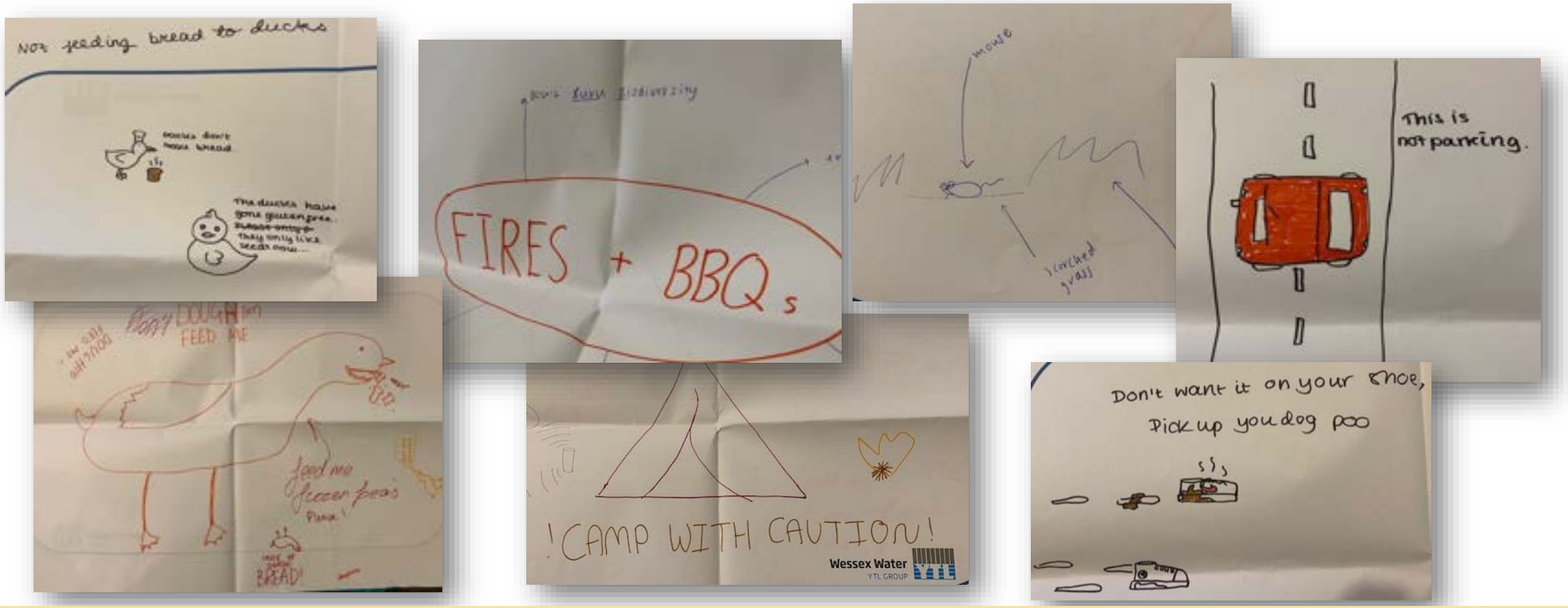
> *"Make it not like a lesson – make it different, unique, a little bit different, not a chore – like something you might do in your spare time!"*
> Future customer

DO

- ✓ Provide **bite-sized** information
- ✓ Keep it **simple**
- ✓ Make it **engaging**
- ✓ **Easy** to access
- ✓ **Interactivity & participation** is key to engagement:
  - ✓ Quizzes
  - ✓ Surveys
- ✓ **Engaging** speakers:
  - ✓ Tone of voice
  - ✓ Positive and passionate → project that they want to be there
- ✓ **Flexibility:**
  - ✓ Enable users to tailor it to themselves, e.g. speed-up or slow-down
  - ✓ Don't insist on cameras on – might be having a bad day

Student views about online education are clearly impacted by their experiences during COVID-19 of online schooling

Engagement: reservoir information boards



Panellists were given a talk on community engagement around reservoirs – and asked to think about ways to communicate with visitors.

- Teams sketched ideas, often looking for humorous ways to make a serious point (a scorched mouse or a badly parked car)
- They were surprised to learn that bread is not good for ducks ('Doughn't feed me…' or gluten-free ducks)
- Linking the message with a powerful environmental motivation: (Don't burn biodiversity)

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